

SGA's Quality Guidelines

Market Research Consulting Services



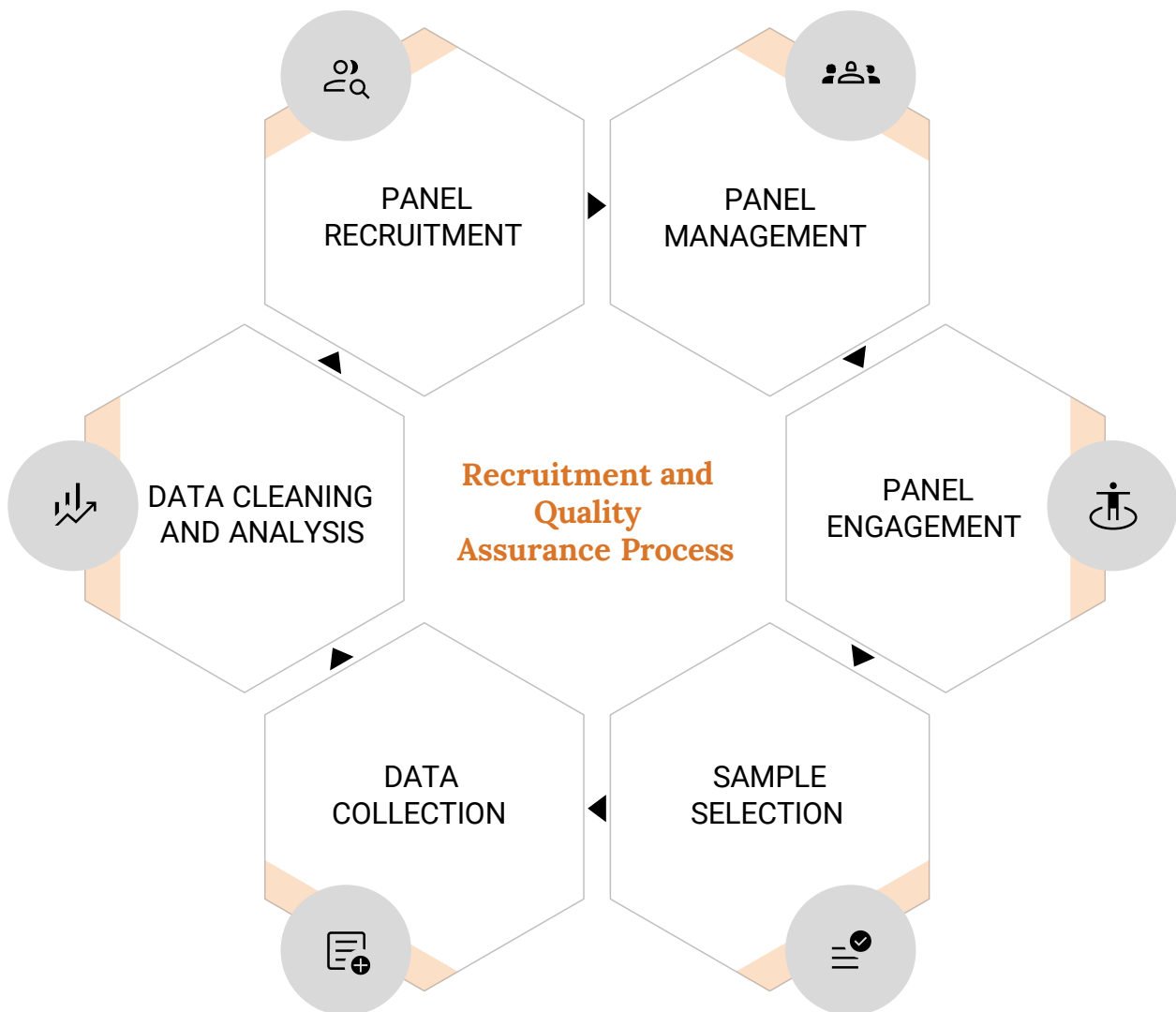
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SGA's Comprehensive Panel Recruitment and Quality Assurance Process

At SGA, we employ an exhaustive and structured approach to ensure the recruitment of high-quality respondents who align with study objectives. The process includes an effective recruitment strategy, stringent screening, and ongoing quality assurance steps that deliver reliable and actionable insights.



Recruitment Process

Multi-Channel Recruitment Strategy

To build a diverse, representative, and high-quality participant pool, SGA employs a strategic combination of targeted and broad outreach methods:

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LinkedIn and Other Professional Networks

- ▶ **Advanced Filtering:** Utilize LinkedIn's advanced filters to identify potential participants based on criteria such as job role, industry, seniority level, geographic location, and specific skillset or expertise.
- ▶ **Personalized Outreach:** Send tailored connection requests, direct messages, and invitations to engage professionals most relevant to the study.
- ▶ **Engagement in Professional Groups:** Actively participate in LinkedIn and other professional forums to build credibility and attract high-quality respondents.

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Industry Events

- ▶ **On-Site Recruitment:** Establish a presence at conferences, trade shows, and webinars to directly engage attendees, highlighting the relevance and value of participating in our studies.
- ▶ **Collaboration with Event Organizers:** Partner with event hosts to access attendee lists, enabling targeted outreach to niche professionals.

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Personalized Invitations

- ▶ **Client Databases and Referrals:** Leverage client-provided lists, past study participants, and referral networks to identify qualified candidates.
- ▶ **Tailored Messaging:** Craft individualized messages that emphasize the benefits, relevance, and significance of participation, encouraging higher engagement rates.

4

Open-to-All Campaigns

- ▶ **Multi-Platform Outreach:** Run targeted campaigns on platforms like Facebook, Instagram, and Google Ads, supplemented by email marketing and SMS outreach.
- ▶ **Diversity and Inclusion Focus:** Ensure inclusivity by welcoming respondents from varied backgrounds while maintaining strict quality control through automated filters.

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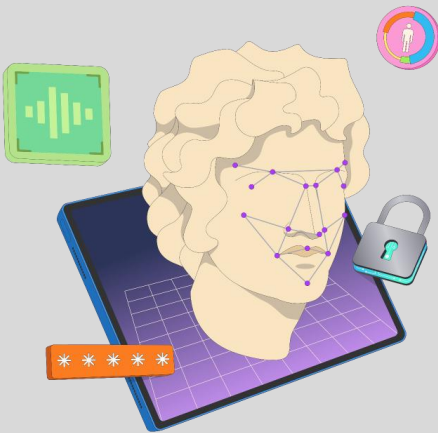
Invitation-Only Campaigns

- ▶ **Exclusive Targeting:** Recruit hard-to-reach audiences or niche segments critical to specialized research objectives through custom recruitment.
- ▶ **Pre-Vetting Criteria:** Use predefined criteria, including certifications, affiliations, or specific professional experiences, to select candidates before outreach.

Recruitment Success Highlight:

Highlight: In 2024, SGA successfully onboarded over **46,000 B2B panelists**, globally.

Screening and Vetting Processes

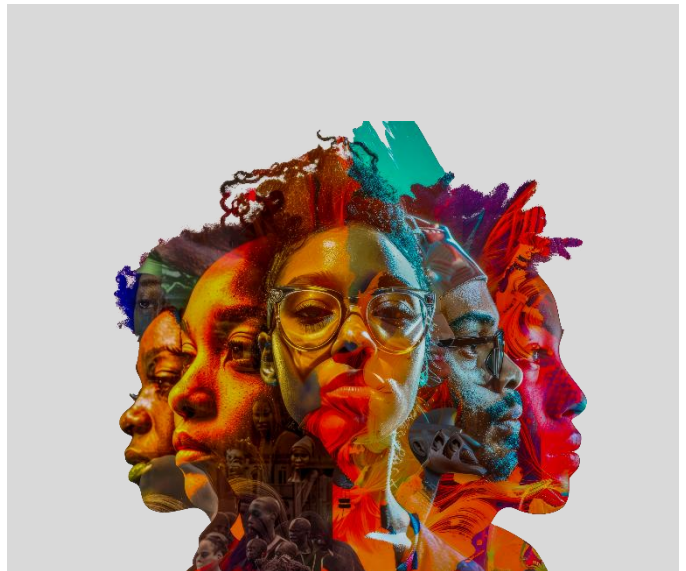


Smart Technology Screening

- **Fraud Detection:** Deploy IP tracking to detect and block duplicate entries, bots, or fraudulent registrations.
- **Pattern Recognition:** Leverage AI-powered tools to analyze registration data for identifying anomalies, such as repeated responses from similar devices or geolocations.

Demographic Validation

- **Cross-Referencing Techniques:** Compare participant responses with known demographic databases to ensure accuracy in self-reported data.
- **Onboarding Consistency Checks:** Validate key information such as age, gender, employment status, and geographic location through integrated, real-time verification tools.



Qualitative Response Checks

- **AI-Driven Analysis:** Use advanced tools to evaluate the coherence, relevance, and originality of open-ended responses.
- **Manual Review:** Supplement AI tools with human review for flagged responses, ensuring nuanced judgment and alignment with study objectives.

Post-Onboarding Quality Assurance



Market Segmentation

- **Behavioral Assessment:** All new panelists are required to complete tailored introductory surveys to evaluate attentiveness, logical consistency, and honesty in responses.
- **Scoring Mechanisms:** Assign quality scores based on response patterns, speed, and completion accuracy, identifying top-tier respondents early in the process. This score is dynamic and keeps updating with additional participation.



Continuous Behavioral Monitoring

- **Engagement Tracking:** Continuously monitor attendance for signs of dropping out using indicators such as hurried completion, random answering, or contradictory responses.
- **Behavioral Profiling:** Create profiles of respondents based on long-term participatory data to only keep top-tier respondents.



Regular Profile Updates

- **Scheduled Updates:** Require respondents to renew their demographic information every three to six months, including employment, household details, and health-associated data.
- **Verification Alerts:** Automate reminders for panelists to confirm and update information, ensuring data accuracy over time.



Enhanced AI and Bot Detection

- **Real-Time Monitoring:** Use AI models that analyze in-survey behavior to detect signs of automation, such as repetitive patterns or unnatural timing.
- **Advanced Device Analysis:** Identify suspicious behavior via cross-device tracking and localization inconsistencies.

Success Metric:

In 2024, **85%** of our panelists maintained a score of over **88%**, ensuring high data reliability right from the outset.



Embedded Quality Checks

- **Attention Questions:** Embed specific questions asking respondents to select a particular option to assess attentiveness.
- **Response Authenticity:** Analyze open-ended answers for coherence, originality, and relevance in language through rigid checking.
- **Speed and Pattern Analysis:** Flag responses completed abnormally quickly or with repetitive patterns, such as straight-lining.

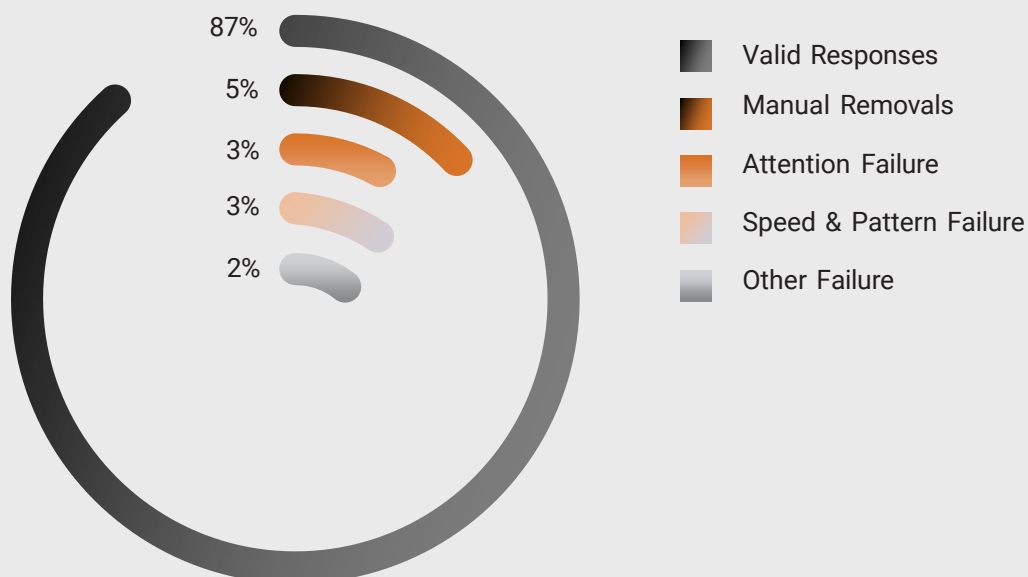


Soft Logic Reviews

- **Expert Review Teams:** Manually review flagged responses to ensure quality and authenticity.
- **Cross-Question Validation:** Compare linked question responses for logical consistency and alignment with expected trends.
- **Secondary Research:** Validate data against industry benchmarks and research to ensure credibility and relevance, wherever needed.

Quality Metric

In 2024, SGA's stringent quality checks flagged and removed 13% of invalid responses.



Managing Quality and Unreliable Respondents

Flagging and Removal

- **Automated Flagging:** Flag all respondents who fail multiple checks, for manual review. Consistent failure recorded across various projects results in permanent removal from the panel.
- **Severity-Based Actions:** Apply penalties ranging from temporary suspension to permanent removal based on the nature and frequency of issues.



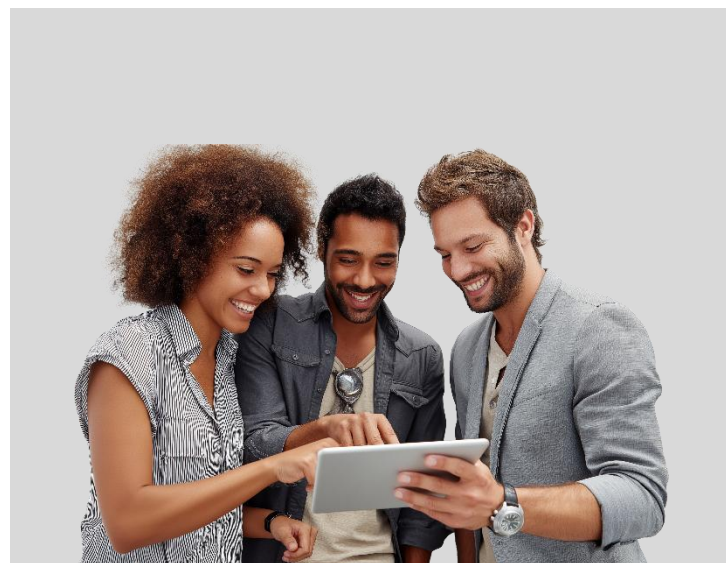
Client Reporting and Transparency

- **Detailed Reporting:** Share flagged responses with clients, outlining specific issues and the corrective actions taken.
- **Immediate Adjustments:** Revise the targeting by excluding troublesome responses to ensure quality delivery.



Preventative Measures

- **Education and Guidance:** Provide as clear instructions to the respondents as possible to minimize errors and increase survey engagement.



Panel Maintenance and Security

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Active Panel Management

- **Inactivity Checks:** Remove panelists who have been inactive for six months to ensure a pool of engaged respondents.
- **Engagement Rewards:** Provide incentives for consistent participation and high-quality responses.

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Account Security Protocols

- **Multi-Step Verification:** Require the respondents to verify email addresses whenever there is an account update or reward redemption activity.
- **Data Encryption:** Secure panelist identification and data to prohibit unauthorized access.

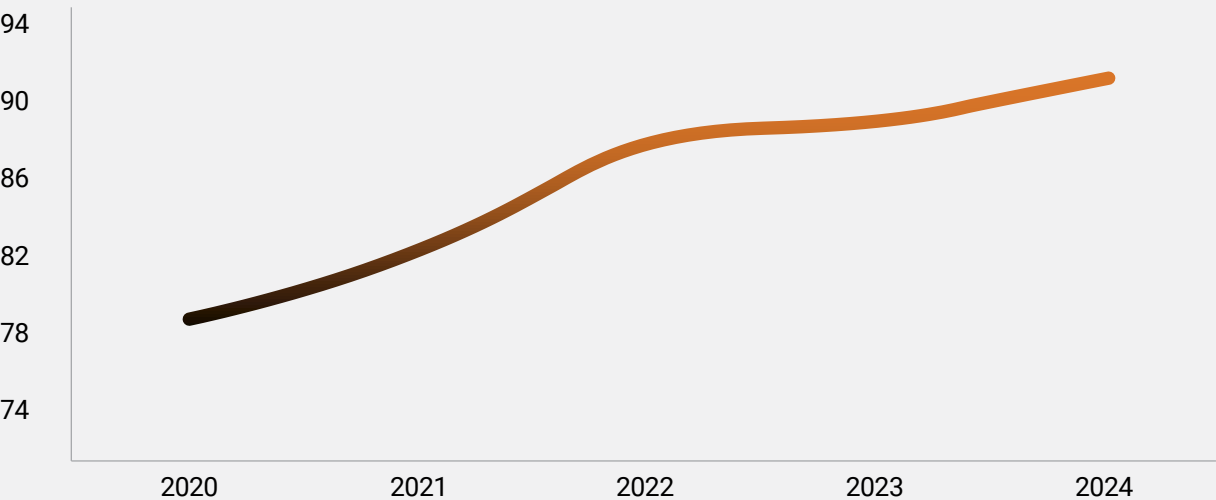
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Ad-Hoc Quality Reviews

- **Project-Specific Oversight:** Manually review client projects with specific data quality concerns.
- **Tailored Corrective Actions:** Flag and address problematic respondents, ensuring dataset integrity and reliability.

Retention Metric

In 2024, SGA maintained a 92%, six-month panelist retention rate, surpassing industry benchmarks.



SGA's Quality Process for Tracker Studies

At SGA, we believe that consistency, reliability, and data integrity are key to maintaining tracker studies. Our quality process has been carefully designed to ensure longitudinal stability and address the unique challenges of multi-wave research while delivering actionable and dependable insights to our clients.

Source Consistency and Blending Strategy

Robust Multi-Source Approach

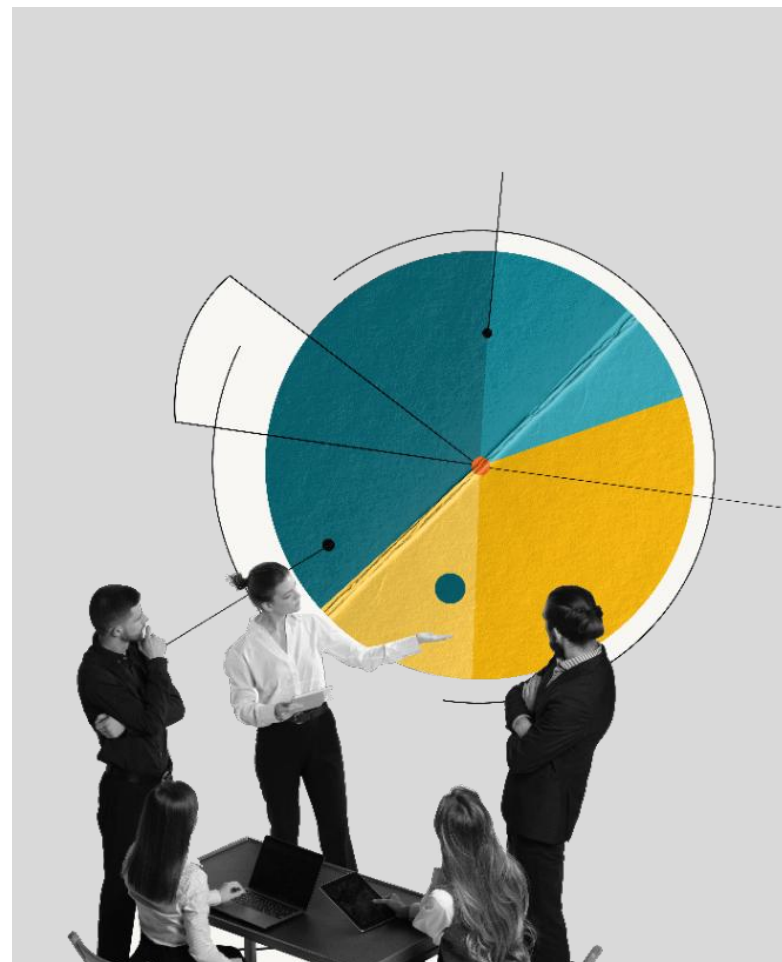
- We manage source consistency by employing a carefully calibrated multi-source strategy that ensures sufficient sample reach, while maintaining data integrity across all waves of a tracker study.
- This approach provides the flexibility to adapt to evolving study requirements, such as integrating new sources or phasing out existing ones, without compromising the stability of the overall dataset.

Proportional Source Allocation

- The proportion of sources in each wave of the tracker remains constant, maintaining stable sample channel composition over time.
- This proportional allocation helps mitigate the risk of variability caused by source shifts, preserving the reliability and comparability of longitudinal data.

Dedicated Team

- We deploy a dedicated team that oversees each phase of the tracker study, ensuring rigorous monitoring, quality checks, and continuous improvement throughout the study's lifecycle.
- This team focuses on maintaining the highest standards of data integrity, proactively identifying, and addressing potential challenges, implementing learnings from previous waves, and ensuring that every aspect of the tracker study is executed seamlessly.



Data Integrity and Quality Control



Real-Time Monitoring and Adjustments

- Continuous monitoring of data quality to detect and rectify anomalies and inconsistencies in real time.
- Real-time adjustments to the sourcing mix in the case of unexpected changes in data.



Analysis of Response Behavior

- Our team continuously tracks respondent behavior across waves, determining changes in patterns of disengagement, inattentiveness, or response bias.
- This process ensures that only high-quality, engaged participants contribute to the longitudinal data.



Alignment with Study Objectives

- Our team regularly assesses tracker data against research objectives to align the study with client objectives while delivering actionable insights.

Risk Mitigation and Strategic Planning



Proactive Issue Identification

- Anticipated risks such as reduced feasibility or service disruption are forecasted through scenario planning and historical data analysis.
- Proactive measures are implemented to address these risks before they impact the study



Client Collaboration and Customization

- We collaborate closely with clients to create tailored sampling plans that suit their needs and provide consistency between waves.
- Detailed reporting ensures that clients are fully informed of any adjustments or updates to the sampling strategy.



Continuous Improvement

- Insights from previous tracker waves are leveraged to refine sampling methodologies and enhance overall process efficiency.
- Feedback loops and regular performance reviews ensure a cycle of continuous quality improvement.

SGA's Approach to Recruiting and Engaging C-Level Respondents

At SGA, we understand the unique value that C-level respondents bring to market research. Their strategic insights, high-level expertise, and influence within their industries make them indispensable for studies requiring informed decision-making perspectives. To build and maintain a reliable pool of C-level executives, we employ a meticulous recruitment strategy, foster long-term engagement, and implement stringent quality assurance measures.

Personalized Outreach

- Leveraging LinkedIn, personal contacts, and other professional networks, we directly target senior executives based on their roles, industries, and experience levels.
- Customized messaging emphasizes the relevance and value of their participation in the research, resonating with their professional interests and time constraints.

By-Invitation-Only Campaigns

- Niche recruitment campaigns are designed exclusively for executives, focusing on their unique experiences and alignment with research objectives.
- Our team conducts a pre-vetting process to ensure that candidates meet the high-level criteria necessary for specific studies.

Industry-Specific Events

- We actively recruit C-level participants from conferences, trade shows, and industry webinars.
- Our team attends these events, enabling us to build credibility and interact directly with executives who meet our panel's requirements.

Referrals and Professional Associations

- Existing panel members are incentivized for referring peers, enabling us to tap into their networks to bring in other C-level executives.
- We also have access to professional associations and executive forums that offer a vetted supply of qualified respondents.

Strategies for Engaging C-Level Panelists

→ Tailored Communication

- Our team sends our regular updates to the respondents, highlighting the impact of their contributions, which helps them understand the value of their participation.
- While designing surveys for these niche groups, we share clear objectives, streamline questions, and offer flexible completion schedules, respecting their limited availability.

→ Exclusive Incentives

- We ensure that the rewards are aligned with their professional interests, such as access to industry insights, executive summaries, or charitable contributions in their name.
- Peer networking opportunities and thought leadership initiatives are also offered to enhance engagement.

→ Ongoing Relationship Management

- We have dedicated team members who maintain consistent communication, addressing any concerns and ensuring a seamless experience for C-level participants.
- We send out personalized invitations to these respondents for their participation in our high-impact studies to reinforce their importance within the panel.

Maintaining Long-Term Panel Engagement

→ Exclusive Community Initiatives

- C-level panelists gain the opportunity to participate in roundtables, exchange ideas, and access premium information by joining special communities.
- Such programs create a feeling of community and motivate ongoing involvement.

→ Ongoing Feedback Cycles

- Executive input is regularly requested for improving survey designs and the overall panel experience.
- This cooperative strategy shows our dedication to honoring their time and knowledge.

→ Data Privacy and Security

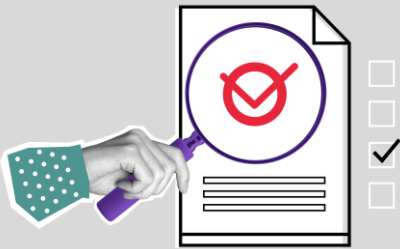
- We adhere to the most stringent data protection guidelines, guaranteeing the privacy and security of all personal and business data.
- C-level participants are guaranteed the confidentiality and expertise of our procedures, promoting long-term involvement and confidence.

Fact: In 2024, SGA conducted **600+** surveys and over **40** in-depth interviews with C-level respondents, globally.

SGA's Process for Engaging Third-Party Sample Providers

While we pride ourselves on maintaining a robust and high-quality internal panel at SGA, we recognize that certain studies may require the support of third-party sample providers to meet specific sampling requirements. In such cases, we implement a rigorous process to vet, monitor, and ensure quality from these external sources, safeguarding the integrity and reliability of our data.

Vendor Vetting and Selection



Comprehensive Evaluation

- We carefully evaluate all third-party sample providers based on their industry reputation, compliance with data protection laws, and adherence to quality standards.
- Providers are required to be certified for compliance with frameworks such as ISO 27001, GDPR, and CCPA, ensuring that they meet global data protection and security requirements.

Capability Assessment

- A detailed review of the vendors' panel composition, reach, and demographic coverage is conducted to ensure alignment with study objectives.
- Providers must have proven expertise in delivering high-quality samples for similar research projects.



Pre-Engagement Screening

- Vendors undergo an onboarding process, including a review of their sampling methodologies, participant recruitment strategies, and past performance metrics.
- A pilot project is conducted to validate their ability to deliver consistent, high-quality responses.

Quality Assurance with Third-Party Providers



Pre-Fielding Checks

- Strict guidelines are shared with providers, including sampling quotas, demographic requirements, and quality benchmarks.



Data Validation During Fieldwork

- A thorough data review is performed to track respondent behavior and identify anomalies such as duplicate entries, fraudulent respondents, or disengaged participants.
- All data collected undergoes automated and manual checks for straight-lining, inconsistent responses, and abnormally fast survey completion.



Layered Quality Checks

- AI-powered tools are employed to review open-ended responses for coherence and relevance.
- Embedded attention-check questions and red herrings are included in surveys to ensure respondent attentiveness.



Ongoing Monitoring and Feedback

- Third-party providers are regularly evaluated for performance, with feedback loops established to promptly address quality concerns.
- Providers that consistently fail to meet our quality standards are blacklisted and removed from our approved vendors' list.

SGA's Commitment to Data Protection and Compliance

At SGA, safeguarding personal data is a cornerstone of our operations. As an ISO 27001-certified and SOC 2 Type II-attested organization, we adhere to the highest information security standards. We are fully GDPR and HIPAA-compliant, and ensure the protection and confidentiality of sensitive personal data across all our processes.

To support SGA's data protection obligations, we maintain a dedicated internal audit and compliance team that oversees legal and regulatory adherence. We have established a robust incident response program, with a designated team ready to swiftly and effectively address breaches or unauthorized access to personal data.

For international data transfers, we implement standard contractual clauses to ensure compliance with data protection requirements when exporting personal data from the EEA to countries without adequate protection laws. Additionally, we have appointed a Data Protection Officer to oversee our privacy practices and provide guidance on maintaining compliance with global data protection laws.

SGA has an unwavering commitment to transparency, accountability, and the highest standards of data protection, ensuring that client and respondent trust remains at the heart of everything we do.

Certifications



SGA's Panel Management Team

At SGA, our panel management team serves as the backbone of respondent engagement and data collection operations. With a steadfast commitment to quality, precision, and efficiency, this team ensures the seamless integration, maintenance, and deployment of our high-quality panel.

Our Team

Analytical Excellence

- Our broader team includes skilled analysts with specialized training in sampling methodologies, ensuring that respondent selection aligns with research objectives and statistical rigor.

Leadership Experience

- The team is led by industry veterans with a cumulative leadership experience exceeding 25 years, bringing unparalleled insight and strategic direction to our panel operations.

Dedicated Expertise

- A specialized team focused solely on panel management, engagement, and deployment, ensures the high-quality execution of every project.
- Members possess in-depth knowledge of respondent behavior, data integrity standards, and the latest tools and technologies in panel operations.

What Sets Us Apart



Focus on Engagement

- Our team emphasizes respondent engagement, ensuring that our panelists remain motivated, active, and reliable.
- Innovative engagement strategies, such as personalized communication and reward programs, enhance panelist retention and participation quality.



Commitment to Quality

- Rigorous protocols for panel maintenance and continuous vetting ensure that our panel remains representative, responsive, and high-performance.



Adaptive and Agile

- The team is skilled at tailoring solutions to clients' specific needs and deploying panels quickly and efficiently for a wide range of study objectives.
- Proactive monitoring of panel health allows us to adapt strategies dynamically to maintain optimal panel performance.



Life's Possible

About SGA

SG Analytics (SGA), a Straive company, is a leading global data and AI consulting firm delivering solutions across AI, Data, Technology, and Research. With deep expertise in BFSI, Capital Markets, TMT (Technology, Media & Telecom), and other emerging industries, SGA empowers clients with Ins(AI)ghts for Business Success through data-driven transformation.

A **Great Place to Work**® certified company, SGA has a team of over 1,600 professionals across the U.S.A, U.K, Poland, and India. Recognized by Gartner, Everest Group, ISG, and featured in the Deloitte Technology Fast 50 India 2024 and Financial Times & Statista APAC 2025 High Growth Companies, SGA delivers lasting impact at the intersection of data and innovation.



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