

Lesson 4

In-house vs. outsourced remote data collection

Introduction

CATI, SMS and IVR surveys can all be implemented in-house or outsourced. At WFP, we say a remote data collection project is being implemented 'in-house' when the core data collection tasks are conducted within our offices, using our staff and hardware. We talk about it being 'outsourced' when the core remote data collection tasks are delegated to an external service provider, using their infrastructure and staff. External providers can be either specialized private companies (such as commercial call centres), or non-profit, non-specialized partners (such as universities and NGOs).

Advantages and disadvantages of in-house vs. outsourced projects

	Advantages	Disadvantages
In-house	<ul style="list-style-type: none"> • Direct control over data collection • Higher degree of flexibility (e.g. adding/modifying questions) • Guaranteed privacy in complex settings • Better feedback/complaints mechanisms • Possibility to hire operators who already have some WFP experience 	<ul style="list-style-type: none"> • Resource-intensive: needs daily management and supervision. Needs dedicated office space and hardware • Your team might have less experience than specialized providers • Less scalable. For CATI, you need to hire more phone operators. For SMS and IVR, in-house infrastructure is limiting factor. • Need to collect phone numbers • Need to manually provide incentives (if offered)
Outsourcing to non-specialized partners (such as NGOs and universities)	<ul style="list-style-type: none"> • No need for dedicated office space • Daily management and supervision is outsourced 	<ul style="list-style-type: none"> • Supervision and training required (including re-training on different food security concepts) • The team might have less experience than specialized providers • Less scalable than when outsourced to specialized providers. For CATI, need to hire more phone operators. For SMS and IVR, in-house infrastructure is a limiting factor. • Need to collect phone numbers
Outsourcing to specialized private providers (such as professional call centres, and mobile surveying platforms)	<ul style="list-style-type: none"> • More scalable than in-house projects (stronger infrastructure / bigger call centres) • Strong quality control processes in place • Professional expertise • Better infrastructure - which translates into higher economies of scale for SMS and IVR projects • No need to procure hardware • No need for daily management or dedicated office space • Usually already have a database of phone numbers that can be used or the capability to do Random Digit Dialling (RDD) • May offer geolocation services • Usually already have professional data entry tools and a call management system 	<ul style="list-style-type: none"> • Contracting can be lengthy (unless a Long Term Agreement is already in place) • Supervision and training required (including re-training on different food security concepts) • High turnover of operators (in the case of call centres)

For SMS and IVR projects, a 'mixed' solution is possible where the data collection process is managed in-house through an open-source interface, while the infrastructure used is that of one or more mobile network operators (MNOs). To date, WFP has not yet tested this solution. More information will be made available soon. The expected advantages and disadvantages of this solution are summarized in the table below.

	Advantages	Disadvantages
Mixed Data collection managed in-house through an open-source interface, while the infrastructure used is that of an MNO / multiple MNOs. Applies only to SMS and IVR tools	<ul style="list-style-type: none"> • Direct control over data collection • Higher degree of flexibility (e.g. adding/modifying questions) • Guaranteed privacy in complex settings • Better feedback/complaints mechanism • Possibility to hire operators who have already some WFP experience • More scalable than in-house projects (stronger infrastructure) • No need to procure hardware • Cheaper than outsourcing the entire process 	<ul style="list-style-type: none"> • Contracting can be lengthy and might involve multiple MNOs and government agencies • WFP has not yet tested the integration process • Daily management and supervision of processes needed • Need to collect phone numbers

Modality- specific advice:

Voice calls: In general, we recommend working with a call centre if they are available. This is because phone surveys are a resource-intensive and specialized task requiring close supervision to ensure high standards. Placing survey calls also requires equipment and space that might not be available at your office. In-house management of call centres means you have to manage airtime, any incentive credit and operator contracts.

Professional call centres are now active in many countries. They can also place voice calls in third countries at a moderate cost and often offer many different languages. Both staff productivity and data quality tend to be higher when we use private call centres.

If there are no private providers able to call a specific country, an in-house call centre could be considered as a last resort. In-house call centres are also appropriate when the information that is being collected is highly sensitive.

Learn more about how to assess a commercial call centre in **Lesson 8: Data Collection**.

SMS and IVR: Free and open-source solutions can now be used to collect data in-house using SMS and IVR without requiring coding skills. This makes it feasible to implement SMS and IVR surveys in-house when a phone number database exists. In-house implementation of SMS and IVR is also very cheap. However, like call centres, this setup requires daily management and troubleshooting. In-house deployments are also very limited in terms of how

many people can be reached simultaneously.

If you require access to a third party phone database (e.g. to carry out large-scale national SMS or IVR surveys), or when the desired sample size is bigger than 300 households/key informants a month, we recommend opting for a third party provider specialized in such services. Alternatively, you could **consider a 'mixed' solution**.

Web Surveys: WFP tested web surveys in Haiti in 2016. On this occasion we outsourced the work to a company based in Canada, who executed the survey for us. People from urban Port-Au-Prince were randomly selected for the survey and completed it on their desktop, laptop or mobile phone. Outsourcing web surveys to private providers can have some advantages, such as the implementation of more complex sampling techniques (see the mVAM blog entry [Now testing: online surveys](#)) that would be difficult to do in-house.

mVAM will test more online surveys during 2017 and more guidance will be provided.

Conclusion

Weighing up all the advantages and disadvantages mentioned above is not easy. That is why we have developed the *mVAM decision tree (3) - In-house or outsourced data collection?* to help you choose the right approach for your needs. The decision tree helps you identify the best deployment solution, considering the following:

- Presence of potential external partners in the country where you operate
- Your desired sample size
- Your office resources
- Your capacity to collect phone numbers / access to existing phone number databases

Disclaimer: the decision tree should not be considered a complete and final decision-making tool, but only as a guide to help you make decisions.



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