

## DCP Marketing Focus Group – Participant Sessions

D-R-A-F-T

**OBJECTIVE:** The objective of these focus groups is to gather meaningful information from DCP participants and prospective participants that can be used to improve the effectiveness of the current DCP Enrollment Kit in informing prospective participants of the opportunities and benefits of participation in the program and to entice (invite, encourage) their participation.

### **RESOURCES / MATERIALS:**

- DCP Enrollment Kit available to each participant at each focus group (12)
- DCP ink pens (36)
- Name tags, Markers, Flip chart easel and “Post It” easel pads
- Oregon “interest brochure”
- Flash cards with numbers 0 through 5 for participants to hold up to rate the kit and its components (12 sets)
- Pre-printed flip chart page with the rating scale to be used for assessing the Enrollment Kit and its components posted on the wall
- Pre-printed scorecard posted on wall to record the ratings (feedback) from individual participants for questions being asked about individual components of the kit (one for each participant session)
- Written “worksheets” for individuals to record their ratings and comments
- Tape recorder for recording discussion to assist with compiling final report (assuming full permission from participants)
- Light refreshments

### **PROCESS:**

- Administrative announcements (rest rooms, break, refreshments, etc.)
- Why we’re here: Focus is on their perception of and reaction to the effectiveness of the Enrollment Kit (not on performance of the market or their individual accounts – good or bad!)
- Remind participants to be candid in their responses.
- What we’re going to do with the information: May keep kit as is. May reduce or modify based on feedback.
- We’ll be asking them to write down some information about their ratings and also to verbally share some of their comments as well.
- Ask permission of participants to record the session to assist in compiling report

### **Overview/Administrative Announcements: (5 minutes)**

Admin (restrooms, refreshments, etc.)

Why we're here (gather info, what we'll do with it, intro people in the back of the room, etc)

Process overview (length of session, questions and rating process, turn in written worksheets with your scores and comments – anonymous, etc.)

Can we record on tape? (purpose, confidentiality, etc.)

### **Introductory Questions: (15 minutes)**

1. Please tell us your first name and your agency.
2. Do you recall receiving the DCP Enrollment Kit? (Poll, show of hands, record count)
3. If your choices to describe your immediate impression of the Enrollment Kit are positive, negative or neutral, how many of you would describe your impression as positive?  
Negative? Neutral?
4. In a few words, what do you remember most about the kit?

Now we'd like to have you take about five minutes to refresh yourselves on the Enrollment Kit. Then, we have several questions we'd like to address with you to get your impressions and assessment of kit and its contents.

### **Transition Questions: (10 minutes)**

We've given you a worksheet and pen (this will be a DCP pen of course!). As we ask you to give us ratings of various items, we'd like for you to first record your rating on the worksheet and a couple of words or short phrase to help us understand why you rated the way you did. Then I will ask you to use your flashcards to give me your numerical ratings to post on the scorecard. A "0" would indicate no impact, does not apply, etc. A "1" is a low rating, indicating little or no impact/influence. A "5" would be high. (NOTE: Review rating scale on the wall)

5. On a scale of one to five, with five being the highest, to what degree would you say the Enrollment Kit influenced your decision to participate? If you did not use the kit at all in your decision making, then you should hold up a "0". In a few words, why did you rate at the level that you did?
6. On a scale of one to five, with five being the highest, to what degree would you say the Enrollment Kit increased your understanding of the benefits of participating in the Deferred Compensation Program? In a few words, why did you rate at the level that you did?

**Key Questions: (30 minutes)**

7. Now we would like to focus on specific contents of the kit and we are asking you to give us feedback on the usefulness of each item in the kit. Again, on a scale of one to five, rate the degree to which you found the following components useful to your decision to participate in DCP. Then we would like for you to briefly tell us why you rated the way you did.

Then we will come back and ask you to help us rank order which items in the kit were most useful and least useful to you in making your decision.

**DCP ENROLLMENT/MARKETING KIT**

<b>Overall Kit:</b>														
	#1	#2	#3	#4	#5	#6	#7	#8	#9	#10	#11	#12		
Kit influenced decision to participate:														
Kit increased understanding of DCP Benefits														
<b>Usefulness of individual items:</b>														
	#1	#2	#3	#4	#5	#6	#7	#8	#9	#10	#11	#12	Top 5	Not needed
Welcome Letter														
Core Brochure														
Quarterly Update														
DCP Quarterly Fund Performance														
Participation Agreement														
PA Instructions														
Investment Fund Options														
Program Highlights														
Sliding Calculator														
Toll free Information Line Directions														
DCP Statement Guide														
DCP Regulations														
<b>Overall Usefulness:</b>														
Usefulness of kit in current form:														

8. On your worksheet, place a checkmark in the “Top 5” column for which five items were most important (useful)?
9. Place a check mark in the “Not needed” column for the three items which were least useful, or that you would delete?
10. Now we’d like for you to rate the overall usefulness of the kit, as a whole. Please rate the degree to which you find the Enrollment Kit useful, in it’s current form.
11. If given a choice, would you prefer the kit as it is, or a fold out brochure with an overview of DCP with the option to request additional items such as are in the current kit? Show of hands for current kit? Overview brochure? (Oregon version)
12. How many of you are aware that this Enrollment Kit information is available on the DCP WEB site? Keep your hand up if the WEB site influenced your decision to participate?
13. For all of you, would you prefer to use the WEB based Enrollment Kit information or the current paper version that is mailed out? How many prefer paper? How many prefer the Internet version?
14. More specifically, how many would prefer an interactive calculator on the DCP WEB site, over the hand held, sliding calculator in the kit? How many would prefer the hand held sliding calculator over a WEB based version? Show of hands for hand held? For Web based?
15. How could DCP improve the information available to you through your employer?

### **Transition to Enrollment Process:**

Now we’d like for you to think about your experience with DCP during your enrollment process. That is, when you made your decision to participate and you were beginning the process to complete the participation agreement, submit it to DCP and receiving your confirmations of participation.

16. Given a choice of easy, somewhat difficult or very difficult, how would you describe your overall experience during the enrollment process? How many easy? Somewhat difficult? Very difficult?
17. What did you find most difficult or challenging during the enrollment process? What did you find most helpful during the enrollment process?
18. How would you describe your comfort level with the enrollment process? How did you feel during the process?)
19. Did you have questions or challenges during the enrollment process for which you could not find? If so, what questions did you have? How did you get them answered?
20. What was most important to you during your enrollment process?

21. What would you change in the DCP enrollment process to improve it?

**Ending Questions:**

22. What was most important to you in making your decision to participate in the Deferred Compensation Program? (Verbal response)

23. The last thing we'd like for you to do is to give us feedback on how well we're helping you to understand phrases and other terminology related to your participation, investment choices and your DCP account. Please take a moment to check the boxes on this sheet to let us know how familiar you are with the terms listed.

**Wrap up:**

- Thank participants
- Remind them to keep the takeaways (pens?)