

— METHODOLOGY PAPER

CATI BEST PRACTICES · B2B RESEARCH

CATI for *B2B*

A Methodology for When Business Audiences Need a Live Interviewer

Telephone interviewing is not the right method for every B2B study — but when the audience is senior, niche, or low-incidence, a live interviewer can reach, qualify, and hold a respondent that an email-and-click survey never will. This is a vendor-neutral guide to the B2B-specific case for CATI: the jobs only a person can do, the screening that needs judgment, the honest online-panel boundary, and where a study crosses from one mode to the other.

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“The question is not whether telephone is old-fashioned. It is whether your respondent will answer an email — or only a phone.”

PHOTO: PEGGY ANKE / UNSPLASH

ABSTRACT

For many business audiences, the limiting factor in a study is not the questionnaire — it is whether the right person will take part at all. Senior executives, technical decision-makers, and low-incidence specialists are heavily over-surveyed and rarely complete an unsolicited online survey. Computer-assisted telephone interviewing (CATI) answers that gap with a **live interviewer** who can reach the respondent, confirm that they qualify, and keep them engaged to the end.

This paper makes the **B2B-specific** case for CATI — not as a default, but as a deliberate choice. It sets out the **self-administered ceiling** for these audiences; the **three jobs only a live interviewer does**; the **screening that needs human judgment**; the **ledger** of what an interviewer adds and what it costs; **when online panel is the better call**; and **where a study crosses** from one mode to the other. It is the B2B companion to the audience-agnostic mode decision of No. 139 and the screen-sharing mechanics of No. 140.

CONTENTS

01	The self-administered ceiling	Why email-and-click misses
02	The three jobs of a live interviewer	Reach · screen · engage
03	Screening on judgment, not keywords	The B2B screener problem
04	The interviewer ledger	What it adds, what it costs
05	When online panel is the better call	The honest boundary
06	The routing line	Where a study crosses to CATI

WHO THIS IS FOR

Research buyers and insights leads weighing telephone for a B2B study; **agency and brand researchers** fielding senior, technical, or niche business audiences; and **methods and procurement teams** setting mode strategy. No technical background is assumed; practitioners can skip to the routing line in Section 06.

01 THE PREMISE

For hard-to-reach business audiences, the study starts before the first question.

The binding constraint on a B2B study is often not how the questionnaire is written but whether the right respondent will take part at all. The most valuable business audiences are precisely the ones least likely to open an unsolicited survey link — and a method that cannot reach them produces a clean dataset of the wrong people. This is the ceiling a self-administered, online-only approach quietly hits.

Who an online-only approach quietly loses

OVER-SURVEYED

Senior decision-makers

C-suite and VP-level respondents are inundated with research requests and rarely complete an unsolicited online survey — so an online-only frame skews toward the more junior and the less busy.

LOW-INCIDENCE

Niche & technical specialists

Industry specialists, technical decision-makers, and procurement leaders are too rare to fill quotas from broad online panel alone, and may not recognise their own eligibility from a cold link.

None of this makes online panel wrong — for broad, digitally reachable audiences it is usually the better choice (Section 05). It means that for the senior and the scarce, **participation, not design, is the problem to solve** — and solving it often takes a person on the line who can find the respondent, explain the study, and book the time.

THE REFRAMING

The first question in a B2B study is not **"what should we ask?"** It is **"will the person we need actually answer the way we plan to ask?"** — and for some audiences the honest answer is that only a live interviewer will reach them.

02 WHAT A PERSON DOES

Three jobs a self-administered survey cannot do.

A live interviewer is not just a slower way to collect the same answers. For a hard-to-reach business audience, the interviewer does work the form cannot — and it is that work, not the channel itself, that makes CATI worth its cost. Survey methodology frames these as distinct interviewer tasks, each carrying its own value.¹

JOB 01 Reach & recruit The interviewer makes contact, explains the study, confirms it is legitimate, and schedules around a busy professional's calendar — turning a likely non-response into a completed interview. BEFORE THE INTERVIEW	JOB 02 Screen with judgment A trained interviewer can probe a nuanced role or authority claim without leading the respondent, catching a false qualification a fixed online screener would wave through. AT THE GATE	JOB 03 Sustain engagement The interviewer keeps a senior respondent moving through a long or complex instrument and clarifies terminology — reducing the mid-survey drop-off that thins an online complete. THROUGH THE INTERVIEW
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REACH · SCREEN · ENGAGE — THE WORK A SELF-ADMINISTERED LINK LEAVES UNDONE

WHY THIS IS A B2B ARGUMENT, NOT A GENERAL ONE

For a broad consumer study these jobs matter little — respondents are plentiful and self-select fine. For a **senior, niche, or low-incidence B2B audience**, each job is often the difference between a representative sample and a convenient one. The interviewer earns their place precisely where the audience is hardest to reach.

03 THE SCREENER

B2B qualification is a judgment — and judgment needs a human.

The hardest part of a B2B study is often not the questions but the screener. Decision authority, purchasing role, installed technology, and organisational context rarely reduce to a clean multiple-choice answer — and a self-administered screener that gets them wrong admits the unqualified and turns away the right respondent. This is where an interviewer's judgment does its most valuable work.

What trips a self-administered B2B screener

- ◆ **Title ≠ authority.** An impressive title may carry no real decision power, and a modest one may hold it — a fixed question cannot tell.
- ◆ **Over-claiming to qualify.** Respondents may select the answer they think unlocks the study, inflating seniority or involvement.
- ◆ **Role & tech nuance.** Installed systems, category responsibility, and buying-stage rarely fit pre-set options cleanly.
- ◆ **The decision unit.** B2B choices are made by groups; one self-report rarely captures where a respondent truly sits.

What an interviewer adds at the gate

A trained interviewer can **clarify a question without leading**, follow up on an inconsistent answer, and confirm authority in the respondent's own words — qualifying on substance rather than keyword. The same live channel also **carries visual tasks**: with screen sharing, conjoint, MaxDiff, concept and pricing exercises run over the phone, so a judgment-screened B2B respondent can still complete evaluative work — the mechanics are the subject of No. 140.

BUYER'S QUESTION

Ask: "**Does our screener qualify on a keyword, or on a judgment a person has to make?**" The more it depends on judgment, the stronger the case for a live interviewer.

04 THE TRADE

A live interviewer is a tool with two edges.

An honest case for CATI names the cost as well as the value. The same human presence that reaches and qualifies a hard B2B respondent also introduces effects to manage and a higher price per complete. The mode is chosen well when the value on the left outweighs the cost on the right for this study — not in the abstract.^{1,2}



What the interviewer adds

THE VALUE

- ◆ **Reach** into over-surveyed, low-incidence audiences a link cannot recruit.
- ◆ **Judgment** at the screener, qualifying on substance rather than keyword.
- ◆ **Sustained engagement** through long or complex instruments, with terminology clarified live.
- ◆ **Guided visual tasks** — conjoint, MaxDiff, and concept tests over screen-sharing.



What the interviewer costs

THE TRADE-OFF

- ✗ **Interviewer effects** on the answers — variability to standardise and monitor away.¹
- ✗ **Higher cost per complete** than a self-administered survey.
- ✗ **Scheduling & field time** — appointments stretch the calendar.
- ✗ **A practical scale ceiling** — interviewer hours cap how large and fast a study can run.

MANAGING THE RIGHT-HAND COLUMN

The costs are real but largely **manageable**: standardised interviewer training and live monitoring contain interviewer effects, and deliberate mode choice keeps measurement comparable where modes are mixed.² The trade is worth making when **reach and judgment are the binding constraint** — and a poor one when they are not.

05 THE BOUNDARY

When online panel is simply the better call.

A method paper that only argued for its method would not be worth reading. CATI is the right tool for a specific problem — a hard-to-reach respondent and a judgment-heavy screener — and the wrong one when that problem is absent. For a large share of B2B work, self-administered online panel is faster, cheaper, and entirely sufficient. Naming where the interviewer adds nothing is part of using one well.

When online panel wins

- ◆ **Broad, digitally reachable** business audiences that online panel can supply at depth.
- ◆ **Short, simple instruments** that need no live clarification or pacing.
- ◆ **Large sample sizes** where interviewer hours would cap feasibility.
- ◆ **Cost-efficiency priority**, where price per complete outweighs recruitment coaching.
- ◆ **Self-evident screening** that a fixed question qualifies cleanly.

Often the answer is both

The choice is rarely all-or-nothing. A common, defensible pattern is to field the **reachable majority online** and use **CATI for the senior or low-incidence tail** that online cannot fill — one study, two modes, under a single master screener. Combining modes well is its own discipline, covered in No. 141; the point here is that choosing CATI for B2B does not mean choosing it for everyone in the study.

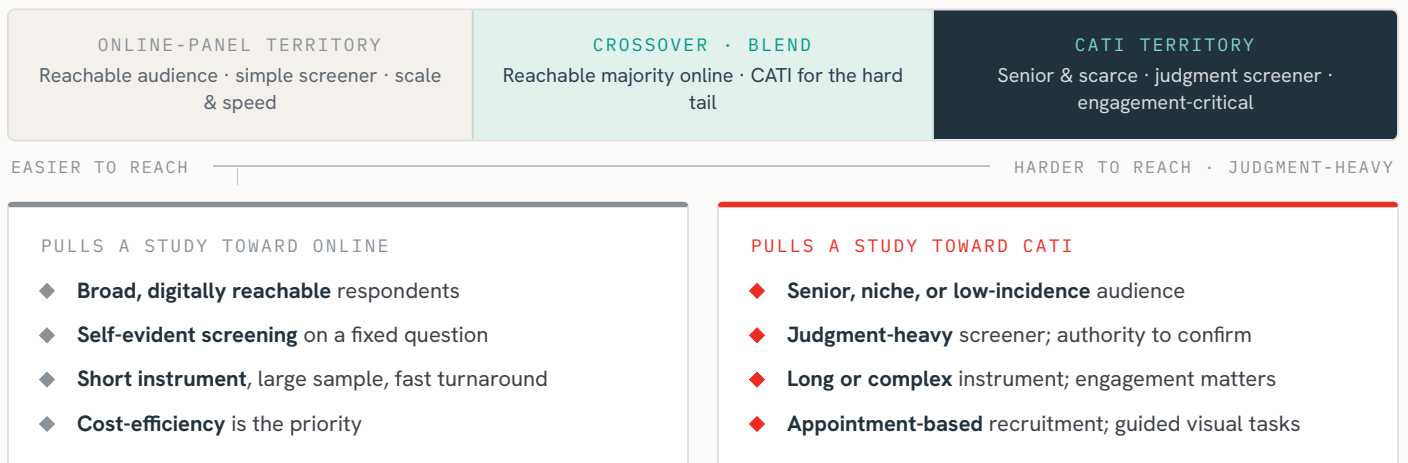
THE BALANCE TO HOLD

Use the interviewer where reach and judgment are scarce; use online panel where they are not — and be willing to use both in one design rather than forcing a single mode.

06 THE CROSSOVER

Where a B2B study crosses from online to CATI.

The decision is less a switch than a position on a line. As a study's audience gets harder to reach and its screener more dependent on judgment, it slides from online-panel territory, through a crossover where a blend fits, into the territory where only a live interviewer will do. The factors below are what move a study along that line.



WHERE THIS SERIES GOES DEEPER

No. 139	When to Use CATI. The audience-agnostic primary-mode decision and suitability scorecard; this paper is its B2B lens.
No. 140	Screen-Sharing CATI. How visual and choice-based tasks run over the phone for a judgment-screened respondent.
No. 141 · 133 · 134	Mixed-mode & B2B sample. Blending the modes, and specifying and sizing the B2B audience this routes.

▲ CONCLUSION

Match the mode to the respondent, not the habit.

CATI is not a relic and not a default — it is the right method for a particular B2B problem: a respondent who is hard to reach and a screener that turns on judgment. Where those conditions hold, a live interviewer does three jobs a self-administered survey cannot — reaching and recruiting the respondent, qualifying on substance rather than keyword, and sustaining engagement to the end — and pays for the interviewer effects and cost it brings by collecting the right people in the first place. Where those conditions are absent, online panel is faster, cheaper, and sufficient, and the honest design is often a blend: the reachable majority online, the senior or scarce tail by phone. Choosing the mode is a position on a line, set by how hard the audience is to reach and how much the screener depends on a person. Recognised conduct and service-quality frameworks let buyers ask for that rigour in consistent terms.^{3,4}

§ REFERENCES

- [1] West, B. T., & Blom, A. G. **“Explaining Interviewer Effects: A Research Synthesis.”** Journal of Survey Statistics and Methodology 5, no. 2 (2017): 175–211. (Interviewer tasks — coverage, contact, recruitment, measurement — and the effects they introduce.)
- [2] Jäckle, A., Roberts, C., & Lynn, P. **“Assessing the Effect of Data Collection Mode on Measurement.”** International Statistical Review 78, no. 1 (2010): 3–20. (Why mode shapes measurement; choosing and comparing modes deliberately.)
- [3] ICC/ESOMAR. **International Code on Market, Opinion and Social Research and Data Analytics.** ICC & ESOMAR. (Conduct and transparency in fieldwork.)
- [4] International Organization for Standardization. **ISO 20252:2019 — Market, opinion and social research, including insights and data analytics — Vocabulary and service requirements.** Geneva: ISO, 2019.

References are cited for the documented role and effects of interviewers and the established understanding that data-collection mode shapes measurement — not for any operational figure transferred to this paper. This paper publishes **no** incidence, feasibility-time, response-rate, or cost statistics; mode choice is described qualitatively and is study-specific. “Aligned to ISO 20252” denotes conformance with the standard’s framework, not third-party certification; any turnaround estimate is a modelled feasibility range, not a guarantee.

§ ABOUT

CatalystMR

CatalystMR is a global market-research panel and fieldwork partner specialising in **hard-to-reach B2B, healthcare, and niche audiences**. We field **live CATI telephone interviewing** — including **screen-sharing for visual and choice-based tasks** — with trained, monitored interviewers, and we advise buyers honestly on when telephone, online panel, or a **blend under one master screener** best fits the audience.

Borderline completes are **replaced rather than silently deleted**, so a study keeps both its quality and its planned base.

Compliance posture: our methodology is aligned to the ESOMAR Code and Guidelines and the ISO 20252 framework, and we are certified under the EU-U.S., UK, and Swiss Data Privacy Frameworks, with personal data siloed from response data.

CATI

B2B RESEARCH

TELEPHONE INTERVIEWING

MODE SELECTION

ESOMAR CODE

ISO 20252

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Tell us your B2B audience, incidence assumptions, and instrument — we'll say honestly whether CATI, online panel, or a blend fits — and return a modelled feasibility range, typically within 24 hours.