

V6 Nov 2009

## Job Description

### Trainee Project Executive

**Reports to:** Project Manager

**Based at:** Leamington Spa

UK Fieldwork Services Ltd  
St Albans House,  
Portland Street,  
Leamington,  
CV32 5EQ

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**Job statement:** Project Executives (PE) are responsible for fully managing internal and external projects allocated to them, from receiving the briefing through to successful completion of the project. During this time, the PE must ensure that the client and Project Manager have regular updates on the project at the earliest possible opportunity and all other relevant parties are kept informed as appropriate. A Trainee Project Executive is working towards self-sufficiency in this role with the support of others

#### **Key responsibilities:**

1. To liaise closely with the mentor/PM & client on each project that has been allocated, to receive a briefing and ensure that all details of the project are fully understood. Any project requirements at this stage that are unclear should be discussed with the mentor /PM and clarified with the client. Project changes that result in changes to the project budget should be communicated in writing to the client & Operations Director. During the life of a project all relevant documents & emails should be [saved to project folder on N.\ for future reference](#).
2. To book out allocated projects to Field Supervisors, maintaining the relevant documentation and reporting any problems to the mentor/PM.
3. *With the assistance of the mentor/PM confirm, via the completion of an External Field Briefing log to the relevant internal Departments any external projects requiring Product Handling, Despatch or Data Processing services.*
4. Following the booking of the project to Field update the Field Schedule with additional information regarding fieldwork dates/venue locations. Subsequent changes to timings must be updated on the FS and all relevant parties informed.

5. To provide the Resource Team with the relevant project information via a copy of the Booking form.
6. With the assistance of the mentor/PM set up allocated projects on The Field System ensuring that all fields are complete.
7. *For all allocated hall tests - to set up the Hall Details & Evaluation Sheet, check any venue, equipment and miscellaneous costs against budget, raise Purchase Orders, venue confirmation letters and incentive requests.*
8. To ensure all allocated interviewer names are entered onto The Field System prior to dispatch for a survey/ [pre-recruitment](#). Hall test interviewer names should be received or requested immediately from Supervisors following the last day of a hall test and entered onto The Field System.
9. *With assistance complete as required a Resource Brief, Product Handling Brief and Printing Log. If appropriate provide DP with a written update on requirements as necessary.*
10. With assistance create/check questionnaires, interviewer/supervisor instructions and other associated field paperwork prior to dispatch.
11. *To liaise with the client and Despatch to ensure the timely despatch of work packs for allocated projects, ensuring all paperwork is in place. If necessary arrange & undertake the dispatch of a project from the UKFS office.*
12. To maintain regular contact with Supervisors/interviewers whilst allocated projects are in the field, to check on progress against quota controls, taking corrective action in liaison with mentor/PM where quotas are going off target/sample not being achieved and ensure that completed questionnaires are returned promptly by the deadlines specified. All corrective actions taken must be noted on the Project Evaluation form.
13. With assistance from the mentor/PM provide timely feedback to the client on the progress of the project, providing details of achieved quota information.
14. To receive and action telephone queries from Field Supervisors, Interviewers and the client, seeking advice as necessary, regarding the fieldwork on allocated projects ensuring that any salient points are circulated to appropriate personnel.
15. *To monitor incoming work packs, following booking in by the Resource Team, assisting with edit checking of completed questionnaires as required, action progress chasing feedback to Supervisors and provide client with updates as appropriate.*
16. *With assistance liaise with DP on allocated projects requiring data processing and review data before forwarding onto the client in conjunction with the Data Services Manager.*
17. To check and authorise payroll reports for allocated projects and raise any

manual payroll entries that are required on allocated projects.

18. To complete a Project Evaluation form for allocated projects and send CSQs.

19. To ensure any left over test product, mock up products or stimulus material is dealt with according to the client's instructions, either returned to the client, stored appropriately or disposed of.

*20. To ensure allocated interviewer details are correct so the Resource Team can chase for any outstanding survey incentives on allocated projects.*

21. To assist the Resource Team in the production of standard interviewer quality letters/pay adjustment letters where appropriate.

22. To help maintain project records and Interviewer and Supervisor records in accordance with ISO Minimum Standards.

23. To provide support to all Supervisors and Interviewers at all times.

24. To promote at all times, a pleasant working environment for all staff and workers at UKFS.

*Items above in italics are generally not required for PRS projects, however there are some specific responsibilities associated with PRS projects and these are outlined below.*

**Key responsibilities associated with PRS projects:**

1. As PRS projects are confirmed by the client an incentive request must be raised
2. To liaise with the client to ensure timely dispatch of hall paperwork, product and stimulus material.
3. Liaise with suppliers about product sourcing where needed, timings and delivery of stimulus material to UKFS or field locations and printing of hall paperwork.
4. Check off product & stimulus material received at UKFS to ensure it is in line with project requirements. Any anomalies must be report to PM and client.
5. Check online link matches all questionnaire stages
6. Arrange couriers to deliver paperwork & product to field locations.
7. Review shelf & table photos requiring client approval.
8. Check daily counts received from client and liaise with PM if corrective action is required.
9. Send FXN files on a daily basis to client

10. Have a working knowledge of how the Eye Tracking kit is set up & works and in liaison with the PM handle basic ET equipment problems, or contact the client for more complex problems.
11. Help pack and dispatch ET kits back to the client