



## **MARKET RESEARCH QUALITY STANDARDS ADVISORY BOARD**

### **GENERAL INFORMATION: ISO 20252**

#### **MRQSAB and ISO 20252**

MRQSAB (Market Research Quality Standards Advisory Board) is an Advisory Board of the Market Research Society (MRS) and has the objectives of:

- Developing quality standards appropriate to suppliers of market and social research services (or participating in their development).
- Setting up arrangements so that companies can be objectively assessed to the standards by independent third parties.

In April 2012, MRQSAB replaced and took over the work of MRQSA (Market Research Quality Standards Association). Members of the board of MRQSAB represent UK organisations and companies involved in market and social research, including companies certified to standards and works closely with the British Standards Institute.

The UK market research industry was a pioneer in developing quality standards with the MRQSA standard published in 1996 and later re-published as a British Standard – BS 7911. Other national market research organisations later produced their own standards and in July 2003 an ISO (International Standards Organisation) committee started drafting an international standard for market research which in May 2006, was published as *ISO 20252; Market Opinion and Social Research – Vocabulary and Service Requirements*. The content of this new standard was in many respects similar to BS 7911 which was withdrawn after adoption of ISO 20252 as a British Standard. In 2012 a revised version of ISO 20252 will be published with changes reflecting developments in market research practice and the experience of companies, world-wide, which have implemented ISO 20252. MRQSA fully participated in the development of the international standard and MRQSAB will continue in to do so.

In developing both national and the international standard account was taken of the international standard for quality management – ISO 9001. This standard sets requirements for managing quality issues and can be implemented by any organisation in any type of business. However, the specific quality levels to be attained are set by the company implementing ISO 9001 and these may be above or below what is recognised as appropriate in a particular industry. In contrast, the UK national standard for market and social research, and now ISO 20252, sets specific quality levels including in areas such as data collection and data processing verification levels. ISO 20252 is though fully compatible with

ISO 9001 and some market and social research companies have chosen to be assessed to both standards. Reasons for having done so may include the wider recognition of ISO 9001 outside market and social research.

In the UK, assessments to ISO 20252 are carried out by MRQSAB approved assessment bodies (see list below). By 2012 around 70 UK market and social research companies and nearly all the larger companies, have been assessed to ISO 20252. Globally, over 200 companies are assessed and certified to the standard.

## **ISO 20252 Requirements**

The major requirements of the standard cover the following areas:

- A company implementing the standard is required to have a documented quality system. In practice this means a set of written procedures covering at least all requirements of the standards that are applicable to the work of the particular company. The procedures need to be auditable – it should be possible to establish, from records, that the procedures have been followed. This requirement, however, does not have to produce massive documentation; for at least smaller to medium sized companies, a procedure manual of no more than 20 pages is appropriate and most records are those produced as an integral part of market research work. Procedures and records can of course be on-screen rather than paper based.
- Document control – mechanisms are required to ensure that it is the correct and up to date versions of key documents, such as questionnaires, that are used. Also quality system documents, such as procedures, need to be controlled and any amendments made only through an agreed process.
- Controls over the development, content and approval of key elements in a research design and the service provided to clients including as set out in proposals, quotations, sampling plans and questionnaires.
- Client liaison and transparency of work carried out for clients.
- Reporting and output delivered to clients.
- Data collection and especially the recruitment, training, verification of work and appraisal of interviewers.
- Carrying out qualitative research.
- Data collection by respondent self-completion or by observational techniques including via the internet and the use of such as social media.
- Data processing including coding and data entry verification.
- Appropriate selection and review of suppliers of key services (eg data collection if sub contracted). Sub-contractor suppliers of services covered by the standard (e.g. data collection and data processing) are required to meet the relevant requirements of the standard (this does not imply that sub-contractors have to be formally certified to ISO 20252)
- Mechanisms need to be in place to identify and correct errors and generally address and solve quality issues with a view to continuous improvement. This includes client satisfaction monitoring.

For the detailed requirements ISO 20252 itself needs to be consulted. A copy of the UK edition of the standard can be purchased from BSI (see contact details on page 5). A document comparing, in detail, changes in the 2012 version of ISO 20252, compared to the earlier one, is available from MRQSAB.

## **Assessment and Certification**

Assessments and certification to ISO 20252 is available from MRQSAB approved assessment bodies (listed below). These organisations are specialists in assessing companies to recognised standards and much of their work, outside ISO 20252, is in ISO 9001 assessment. The MRQSA approved bodies are accredited by UKAS specifically for ISO 20252 assessment (UKAS - United Kingdom Accreditation Service – a government endorsed body which regulates assessment bodies). Accreditation by UKAS is to a specification developed by MRQSAB – *Specification for Assessment and Certification to ISO 20252* (obtainable from MRQSAB) - and this covers the key elements of the assessment process.

Assessment of a company, by a MRQSAB approved body, includes a review of the company's documented quality system (eg the procedure manual), followed by audits to establish that the quality system and ISO 20252 requirements are being followed. If the assessment results are positive, the assessment body issues a certificate. It should be noted that some minor failings to follow the quality system in specific projects do not necessarily lead to an assessment failure – the assessment body will note such "non-conformities" and request the company to take appropriate "corrective action". The input by the assessment body and the fee charged for the service in initial assessment is dependent on the size of the company being assessed.

Assessment is not a once-off process. Every year the assessment body re-visits the company and carries out "surveillance" to ensure the standard is still being met. Such surveillance visits involve significantly less input than in the initial assessment by the assessment body with work areas covered in rotation.

Companies wishing to be assessed and certified to ISO 20252 select (e.g. after receiving alternate quotations) one of the MRQSAB approved bodies and pay the agreed fees for initial assessment and subsequent annual surveillance. These fees are typically charged at consultant day rates with the number of days related to the size of the company assessed. A company may change its assessment body after initial assessment.

If required, assessment to ISO 20252 can be combined with assessment to ISO 9001 and the process should be seamless. It should be noted, however, that ISO 9001 may involve some requirements additional to those of ISO 20252.

## **Implementing ISO 20252 and Preparing for Assessment**

A company wishing to implement ISO 20252 should first establish which parts of the standard apply to its own operations (e.g. if interviewing is sub-contracted, the requirements for interviewer management do not apply directly). Any company involved in any aspect of market research services can implement the standard or relevant parts of it. Companies which have been assessed to ISO 20252 range through full service research supplier, data collection sub-contractors and data processing specialists.

The existing practice of the company in areas relevant to the standard needs then to be carefully compared to the requirements of ISO 20252 and any gaps identified. Such gaps will require changes in working practice. However, nearly all companies find that in most areas their existing practice meets, or is not far from, the requirements of the standard.

Procedures and other relevant documents need to be drafted. Often most procedures are no more than a confirmation of what already happens although some will cover areas where a change in practice is needed. Procedures should be then reviewed to ensure that at least all relevant requirements of ISO 20252 are met. A company may well of course cover areas in its procedures that are in addition to ISO 20252, although it may be better to keep the quality system to a minimum, at least initially.

Once the procedures are finalised they need to be implemented effectively - followed by all staff. Since many procedures will only reflect existing practice this need not present many difficulties. However, successful implementation should be checked by simple internal audits. Done well, internal audits mirror the external assessment and, therefore, prepare the company for successful assessment. Problems found in assessment need dealing with. This may involve amendment and fine-tuning of procedures or some training of staff.

After the procedures have been followed for a minimum of three months, the company can arrange for assessment by a MRQSAB approved assessment body.

It is perfectly practical to implement ISO 20252 with internal company resources only. Alternatively a company may wish to use the services of a consultant specialising in this area and whilst fees will be incurred, the process may be quicker and smoother and not tie up internal staff to the same extent. Whether consultants are used or not, however, it is important that the company's senior managers are fully committed to the process and that at least one of them takes responsibility to drive the process. A member of staff is also needed to administer the quality system though for smaller companies this is very much a part time responsibility.

## **Useful Contacts**

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**MRQSAB Approved UK Assessment Bodies**

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