# Six Steps for Successful Surveys

## Overview

Since the first Web-based survey was conducted in 1994, the use of online surveys has steadily increased as a means of collecting valuable information from important stakeholder communities of employees, customers, partners, and prospects. Companies are quickly realizing the value in engaging these stakeholders in a regular and consistent dialogue to gather real information that can dramatically and positively affect business.

Online surveys are extremely cost effective and far easier to implement than traditional survey models, which accounts for their widespread use and popularity. But whether on paper or on-line, the response rate for any survey and the quality of the information that is extracted from the survey is heavily dependent on how well the survey is written and implemented. Using a web-based survey tool still requires that that best practices and strategic planning be employed to get the results that drive real value to the organization.

Vovici has a collective 25 years of experience and has generated over 100 million survey responses on behalf of our clients. As a result we have seen firsthand what works and what does not work and we have captured and distilled that information to help our customers meet their objectives. This white paper represents some essential guidelines to create and implement successful surveys.

Expert Tip: Keep surveys simple by concentrating on a single underlying theme. The respondent community will stay more engaged by deploying multiple brief surveys rather than long extensive ones, leading to a stronger relationship with the community.

## Step One: Clearly Define Objective and Goals

One of the most important aspects of developing a survey strategy is to clearly define objectives and goals. Having specific objectives will serve as the foundation of the survey, as well as a guide when designing questions. It is important to share objectives with respondents—properly setting their expectations from the beginning. People are more likely to participate when they know the reasons for conducting the survey, what information will be requested, and how their feedback will be used.

First-time survey authors are often tempted to collect as much data as possible from a single survey. This practice generally leads to lengthy surveys that overwhelm the respondents, causing them to abandon the survey. Another common mistake is the practice of asking questions that are leading or contain bias, or generating questions and instructions that are unclear or confusing. Concentrating on the primary goals keeps the questions focused.

## Step Two: Ask the Right Questions

Start designing a survey by constructing questions that provide the information needed to achieve survey objectives. These questions make up the important core of the survey and since we recommend that surveys be kept brief it is prudent to begin with what is absolutely essential. The core questions should be tested for both clarity and function—meaning that answers align with primary objectives. The best way to ensure valuable questions get answered is to perform live testing and analyze results. (More information on testing is included in Step Five.)

Expert Tip: Show respondents that their time is valued by keeping the survey to 30 questions or less. Add appropriate branching patterns so respondents do not see questions that are not relevant to them, based on their answers to earlier questions. In most cases, respondents should be able to complete the survey within 10 to 15 minutes.

Once the core questions are identified, additional questions can be added to gather critical demographic and other profile lifestyle data—gender, marital status, income level, job title. It is imperative that the objectives are considered because while the core questions collect the actual data that is analyzed, the demographic data enables further analytic segmentation.

Special consideration should be taken when using scales to rate the respondent's preferences and opinions. Determining the proper scale is very important and should receive special consideration. When using a numeric scale (i.e., 1 to 5, 1 to 7 or 1 to 10), the range of the scale should be clearly defined for each question and used consistently throughout the survey. As a general guideline, scales should match the ability of the respondent to differentiate. For example, when asking someone to measure the performance of a sales representative, a 5-point scale is likely more appropriate than a 10-point scale. The reasoning is that most customers would not be able to differentiate a single-point rating difference—the difference between a rating of 7 or 8 for a particular sales representative—versus a less granular scale.

Quality response data is the result of well written and concise questions. Complicated surveys impact response rates and predispose respondents to not participate in future surveys. Well written surveys have proven to drive response rates that are often 3 to 6 times the historical average.

## Step Three: Select the Target Audience

Selecting the target audience will largely depend on the objective of the survey. Once the target audience is identified, it is important that responses are solicited in a manner consistent with the research objectives. The two common approaches are convenience samples and representative samples.

A convenience sample is not statistically valid, but is useful when soliciting ideas or gathering general impressions. In web surveys, a convenience sample is typically solicited simply by posting a link to the survey on a web site, in a newsletter or blog. Sample applications include gathering suggestions for improving a web site, product or service. A good idea or an original idea doesn't need statistical validity to be useful. Once sufficient ideas have been collected in this way, a survey using a representative-sample can be conducted to prioritize the relative importance of each idea.

Expert Tip: Remember to pay attention to how respondents are recruited; otherwise, survey results will be not be statistically representative of the target audience.

For a representative sample, care must be taken that the recruitment methods provide an equal chance of soliciting each member of the target audience. Sending email links to an employee satisfaction survey to factory workers would not result in a representative sample if even a small minority of the factory workers lacked computer access and email addresses. Email lists that are rented from magazines and web sites typically do not provide representative samples either, since the source of the lists is skewed to very specific audiences.

The best approach to develop representative samples is to build panels from their community segments—customers, employees, partners. This presents a huge advantage over ad-hoc methods. Community members who opt-in to the survey process are asked to complete a comprehensive profile to place them across multiple demographic, economic, and preference categories. Surveys then can be deployed to appropriate panel members using their profile data as filters, providing multi-dimensional analysis.

## Step Four: Solicit Participation

If the nature and objectives of a survey dictate that respondents must actively be solicited, there are several courses of action. The most common method of solicitation is to e-mail a list of target respondents. As a basic rule, B2B efforts should avoid Mondays and Fridays; B2C should plan on Mondays and Fridays. If possible, it is good to test various days and times to identify the optimal choice for your target audience. As a basis for comparison, a well-targeted invitation should achieve a 10 to 15% response rate.

The source for the email lists used for solicitation can range from in-house lists, community panels, or lists purchased from vendors. The vendor lists may be mailing lists from third-party brokers or from panel providers who have performed solicitations in advance and have well profiled panels whose members have agreed to be part of a survey. These two list types represent opposite ends of the scale for response rates (the percentage of people that actually complete the survey).

While email is the most popular, alternative methods of soliciting participants include telephone, banner advertisement, direct mail, or fax. There are advanced survey requirements that require a multi-modal approach that uses a mix of these sources. Each of these methods has their challenges, and nearly all have seen a decline in response rates over the past 10 years.

Frequently, incentives are used to drive higher participation rates, particularly if the survey targets groups that traditionally are low responders. The need for incentives is dependent on how motivated the potential participants are to complete the survey. Experience indicates that if the survey is within an area of interest to the participants, an incentive is not necessary. Some studies say up to 50% of participants feel incented when they are given the opportunity to view survey results. If it is determined that a true incentive is needed, experience shows that the best incentives reward the individual directly. Entries in raffles and contests are less effective than purchase credits, discounts, and cash incentives. Recent research has also shown that paying all potential respondents a nominal incentive ($1-$5) prior to participation is actually the most cost-effective recruitment method, creating a sense of obligation on the part of the recipient that results in a much greater likelihood of participation.

Expert Tip: To avoid violating the CAN-SPAM Act, anti-spamming law, make careful considerations of where and how respondent lists are acquired. If an internal list is not used, invite respondents using reputable, third-party list brokers, panel providers, or other sources of opt-in lists. Opt-in means that the list was developed from people who have agreed to receive unsolicited e-mail.

## Step Five: Test the Survey

To ensure the success of a survey initiative, it is critical to test every phase of the process. Testing a survey initiative is really an exercise in risk management with the end result the protection against poor response rates, the confidence that the survey is aligned with the research objective, and the assurance that the survey in no way compromises the integrity of organizational reputation or company brand.

This phase has two key tasks: testing the survey instrument and testing the analysis and reporting. Testing the survey instrument encompasses every aspect of the deployment. For example, the subject line is attractive and inviting so that respondents open the e-mail; the text of the invitation avoids keywords that might get the message misclassified as spam; the vehicle used to distribute the survey is functioning properly; and the "look and feel" is consistent with company brand and/or objectives. Care should be taken to ensure that the questions do not assume an understanding of the subject matter or use insider jargon or acronyms.

Expert Tip: Run the initial test on an internal audience before sending the survey to an external list. It is very important to thoroughly test every hyperlink and each branching pattern within the survey to ensure that they are working as intended.

Additionally, there is the need to run test surveys, analyze test data and generate sample reports. This determines if the instructions and questions are clear to the respondents, and if the collected data can be applied to satisfy the research objectives. If the survey data cannot answer the fundamental question of the research and is somehow incomplete, then the survey needs to be modified to fill in the gaps.

## Step Six: Execute and Analyze

On average the expectation should be that approximately 50% of the responses from a particular solicitation will be received within the first day. The vast majority of the responses will be received within four days. This means that after the first four days it should be apparent if the survey will yield a sufficiently large sample of respondents.

Analysis is the key to making the data useful. It is a common error for first-time survey authors to present the data in bulk, raw format. The information in this data is lost because it lacks structure and context, and there is nothing actionable about the data that applies to the business. The data must be analyzed to identify trends, highlight unexpected findings, and draw conclusions. Be sure to provide executives a summary of data, and provide actionable recommendations where appropriate. Products like Vovici EFM Community and EFM Feedback can export data to common tools such as Excel, so that the information can be refined and put into presentation quality formats for easy understanding. In summary, the value of survey data is compromised if you do not provide a satisfactory summary of results and suggested actionable items.

Expert Tip: Data should be shared across the organization with all interested parties who stand to benefit from the information. From an external perspective, the simple act of publishing survey results has helped organizations develop reputations for thought leadership within their industries.

## Conclusion:

Well-written surveys bring the double benefit of gathering quality information and generating high response rates. The information drawn from a survey is only as good as the questions asked, and participation level—for the current survey and for the future—is negatively affected when respondents are asked to take a survey that is unreasonably long and packed with poorly written questions and confusing answers. There are simple guidelines that, when followed, ensure that not only do respondents feel good about the process, the organization gets the information it needs to make better, more informed business decisions.