

how to build highly effective surveys

~ Mark Healy / Partner / Torque

I just finished watching the final episode of Lost, current season. The last TV show I watched religiously was the X-Files. It was cancelled 7 years ago. But dang! Is Lost ever getting good now or what? New characters. Flash forwards, not flashbacks. More questions. Zero tangential story line continuity. And the most compelling content always comes at the end, in the scenes-from-the-next-episode bit.

The way Lost is put together is exactly the opposite of how a good survey should be constructed. 180 degrees opposed. The antichrist of survey construction.

Surveys can be very powerful market research tools for businesses who are trying to get a better handle on any number of issues – customer experience, brand association, quality, etc. – if intelligently designed and well executed.

I've become a bit of a survey snob. I've built or edited so many over the past few years in my work life, I pick up on poorly thought out surveys in my consumer life. It's not that putting together a good survey is hard, it's just that – like anything else – there is a process to it, and attention to detail really matters. Here are some ground rules for building a killer survey and driving above-average participation.

The Process: Construction

The process underlying a solid survey build is very straight forward and obvious. Yet rarely followed. (Said in a country singer's accent) It goes somethin' like this:

- A. Identify the target audience
- B. Select the medium of distribution
- C. Determine, specifically, the goal of the survey
- D. Sort out the 3-5 metrics – things you want to measure/graph/report on later
- E. Write the questions

This is where people usually go wrong: they start by writing questions. That is like flooding your backyard before leveling it or putting up boards – you'll get a rink but it won't be any good. Here is an example of a good consumer survey process.

- A restaurant chain wants to better understand how to appeal to youth. They would first define "youth" – age 6-18? or 14-21? or whatever.
- Next up they would pick the medium that makes the most sense to get at that segment. If the 14-21 year-old set is selected, an online survey probably makes more sense than in-restaurant deployment.
- The first meaty decision is to really understand the goal of polling customers – in this case it might be to understand what marketing tactics (and not what menu items) would draw in this crowd.
- Metrics are next – determining what really needs to be measured. In this case, the chain might select a) TV advertising effectiveness, b) contest effectiveness c) social media effectiveness.
- Finally, questions would be crafted to address each of the metrics. For example, for contest effectiveness, two potential questions could be: i) if we offered free "dinners-for-two" as prizes in random draws, would you be more likely to eat here more often? (Y/N), and ii) on a scale of 1-5, how much did our X-Box contest influence your decision to eat here?



The Rules

There are 10 simple rules to building and launching a good survey:

1. The first rule of fight club is: do not talk about fight club. Never use the actual word “survey” in any of the communication about the survey or in the questionnaire itself – potential respondents will turn off immediately. (“Please take 5 minutes to provide us with your input on...” or something similar works better.)
2. Never start a survey with demographic questions – it is off-putting to some – ask these questions last.
3. Never start a survey with an “introduction” question that is actually a bit off topic – this confuses people.
4. Start with the most relevant questions – if people drop out after 4-5 questions, at least you have data for the questions you really care about.
5. Always start a survey with a question that will likely elicit a positive response – a ‘yes’ or a good news answer – this puts people in a positive frame of mind and you are less likely to have people drop out of the survey.
6. Keep questions short and punchy, ensure they are unambiguous, and that each question goes after only one thought/idea.
7. Put a note at the top of the survey or in the communication that goes out with it from the Top Dog (President, CEO, Head, etc.) appealing to the reader (“help shape the future of your YYY...”) – this increases response rates by as much as 50%.
8. Online survey respondents become bored and frustrated after the 10-minute mark. Keep surveys short and advertise up front that it “will take 3-5 minutes”.
9. Categorizing questions by topic is a convenient way to organize questions during the writing phase. However, arranging these questions to form a story helps respondents to see the purpose of each question in relation to the whole survey.
10. The response rate is always higher on the weekend for online surveys – so launch on Thursday / Friday to achieve the most rapid initial response.

The Process: Deployment

Again, there is a process for “launching” good surveys. Typical response rates for consumer surveys are in the 3%-8% range. I’ve seen response rates driven as high as 40% through smart planning and execution:

- A. Get a second set of eyes on the survey before distributing anywhere. Any mistake – big or small – will lower participation and could skew the data.
- B. Test the survey. Carve out a few test participants from your survey audience and send it to them first – then see how questions are answered and ask test participants for feedback on length, format and wording.
- C. In parallel with B, get in touch with the participant audience and let them know a survey is coming and why it is important their voice is heard/how it will benefit them later. This is the crucial step in driving participation rates above the average.
- D. Launch the survey.
- E. Send a follow-up communication to the participant audience, imploring participation, to get one more bump or spike in “completes”.

What you do with the data once you’ve got it is a whole other story. But putting together a tight survey is the 1st step toward getting good data. Done well, surveys can unlock deep insights and inform important decisions.

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