



So, You Want to Send a Survey...

If you need simple answers to specific questions from a large audience, then surveys are for you!

SO YOU WANT TO SEND A SURVEY

Surveying your customers and employees is one way to obtain valuable information. Here are some surveying basics to understand. There are entire courses on this subject, so we're just going to focus on the key factors. First, we will look at what surveys are used for, when to send surveys and the types. Then, we'll look at best practices in survey design.

The first thing to remember when deciding to run a survey is what you will do with the results. There's no point in asking your customers to take the time to respond to survey questions when you don't intend to do something with it.

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WHY USE SURVEYS?

You can use surveys to gain an understanding or impression of many different things, including to:

- Understand customer/employee satisfaction levels
- Dig in to why satisfaction is at a certain level
- Learn what you can do to improve satisfaction
- Evaluate company performance on established goals
- Get feedback that you can use to make operational improvements
- Obtain information to use in employee incentive programs (note, if you are going this route and plan to use survey results as a part of employee performance ratings and pay, it is best to work with a provider who can help ensure the statistical significance of the results)



WHEN SHOULD A SURVEY BE SENT?

When sending a survey, timing is an essential factor to consider. Ensure the questions are relevant to the recipient and that the use of the information is top of mind.

- Transaction-based surveys are sent after a transaction, such as a sale. They are used to understand the customer's impression of the transaction.
- Event-based surveys, such as a customer appreciation party, are sent after an event. They are used to understand the customer's impression of the event.
- Point-in-time-based surveys are sent at any point in time to gauge overall impressions. An annual employee satisfaction survey is an example of a point-in-time-based study.

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WHAT TYPE OF SURVEY TO USE?

There are three main types of surveys available, and each has its intended use, pros, cons, and associated costs.

- Online surveys are the most utilized due to their speed, ease of use, and cost-effectiveness. They are valuable when you have an email address available for the recipient. Sometimes, you can send a paper-based postcard to a home address with a URL or pURL. In addition, online surveys are inexpensive, with some free options for simple surveys.
- Phone surveys are another efficient way of getting results quickly. Automated IVR systems allow the recipient to answer questions using the telephone keypad reasonably inexpensively. In contrast, Interviewer-based survey is more costly due to human involvement in asking questions and recording responses.
- Paper surveys are mostly sent through the mail and can come in multiple sizes, e.g., postcards, letters, and legal. Recipients fill out the survey and then mail it back for tabulation. Paper-based surveys used to be the gold standard. But these days, they are typically used when email addresses are unavailable for many of your intended recipients (or if your audience doesn't use email). Paper surveys are typically the most expensive due to the cost of paper, postage, and handling. Another way of utilizing paper surveys is through comment cards. These are usually in hotel/restaurant lobbies with a stack of postcards next to a collection box. This approach is inexpensive to obtain feedback without needing customer addresses but has a relatively low response rate.

The types of questions, how they are ordered, and how they are worded are all critical factors when designing a survey since they all can impact the survey results.



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OVERALL DESIGN

When sitting down to design a survey, one of the first things to consider is the order of questions. If the survey is about an experience, it is best to ask the questions in the order of the experience. For example, surveying customers about a dining experience, you would want to ask about the wait time for a table before asking about their satisfaction with the meal.

Think of question order from the high-level to more detailed questions, where you can ask the broadest to the most narrow or narrow to the most general. The best way to think about this is with the overall satisfaction/impression questions. If you ask about overall satisfaction (broad) as the first question, you will get the respondents' top-of-mind response. If, however, you ask about the details of the experience first and end the survey with an overall satisfaction question, the respondent will consider the things previously asked. This approach could impact the overall-impression question positively or negatively depending on the previous questions.

The overall length of the survey is essential to keep in mind. People's attention spans are slim these days. So suppose a survey drags on for too long, and you will end up with a high abandonment rate for online surveys or a lowered response rate for paper surveys.

TYPES OF QUESTIONS

There are two basic question types, closed-ended and open-ended. Closed-ended questions have predefined answer options for the respondent to choose from. In contrast, open-ended questions allow the respondent to provide their answer.

Closed Ended

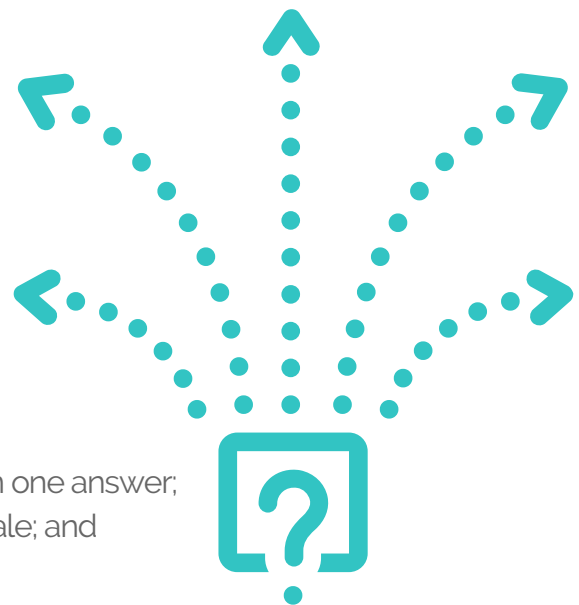
- What is your favorite type of muffin?
- blueberry
- banana nut
- apple cinnamon
- other

Open Ended

- Describe your favorite kind of muffin.

Additional closed-ended question types include

- Multiple selections, where the respondent can choose more than one answer;
- Scalar questions, where the respondent rates something on a scale; and
- Yes/no questions.



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QUESTION-WORDING

How questions are worded can impact survey results. Leading or biased questions can draw the respondent towards a response. Double-barreled questions are ones where the question asks about more than one thing and causes confusion in the respondent. For example, how satisfied were you with the taste and texture of the muffin? If the respondent likes the taste but hates the muffin's texture, they would have difficulty answering this question.

The easiest way to check your question wording is to have some people take your survey as a test run and provide you with feedback. This approach will also help you check the flow of the questions and instructions. Find a coworker or friend outside the project stakeholders to help you with this step.

If all of this sounds daunting, but you know you want to collect more information from your customers or clients, let us know, and we'll be happy to walk you through some of the complexities. We even have multiple software applications to conduct online surveys and the resources to help manage and facilitate phone and paper surveys. But, most importantly, we can help you analyze the results.



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