

surveygizmo

Guide to

Great Survey Design

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What Is Great Survey Design? And Why Should You Care?

Running A Survey Can Be Hard

Great Survey Design makes it easier.

Over many years and thousands of surveys, we here at SurveyGizmo have made some discoveries.

People run surveys for all kinds of reasons, but all kinds of surveys need the same things.

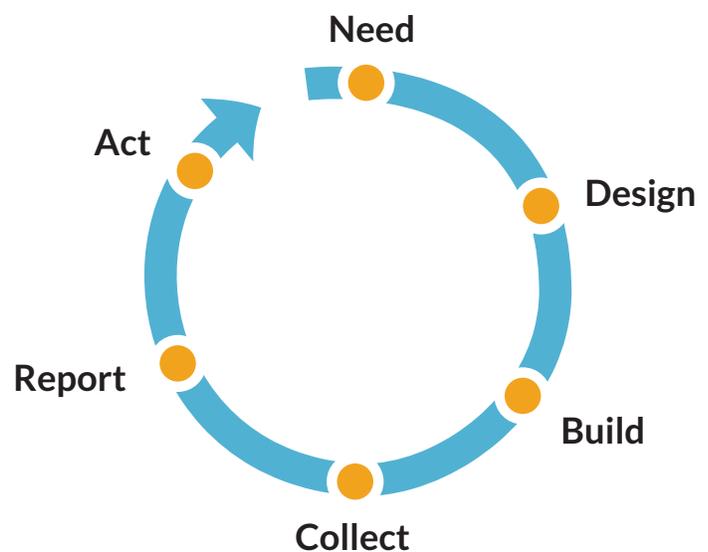
Great surveys have a clear purpose, they're easier to administer, easy to take, and they produce accurate data.

Most importantly, great surveys let you make informed decisions.

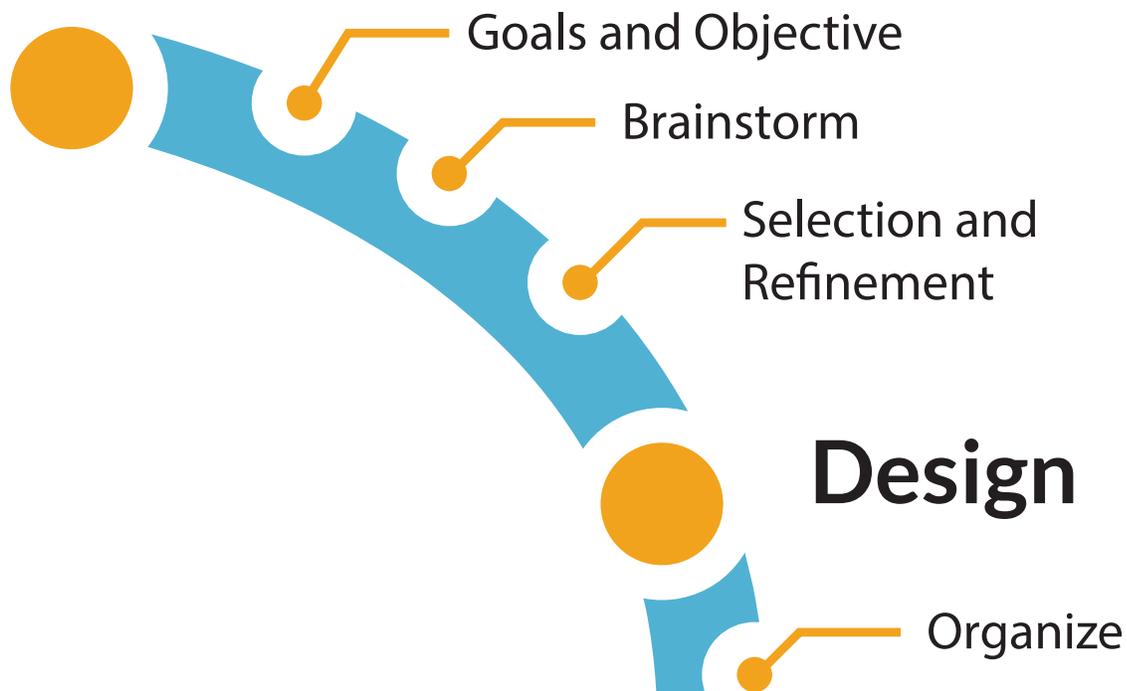
So we've compiled our vast survey knowledge into this 6-part guide, which will give you the power to create great surveys that make you look like the rock star you are.

Why Great Survey Design?

- ✓ Surveys work better
- ✓ Respondents are happier
- ✓ Data is more accurate
- ✓ Reporting is easier



Need



PART 1: IDENTIFYING NEED

WHY DO YOU WANT TO
RUN A SURVEY?

Questions to Determine Survey Need

When trying to determine the needs you're hoping to meet with your survey, it can be helpful to ask yourself and your team some of these questions:

- ✓ What are we trying to figure out?
- ✓ Why do we want to know?
- ✓ What will we do with this data when we're done?
- ✓ What kinds of reports or data do we need?
- ✓ Who is our intended audience or population?
- ✓ How are we going to access the target audience?

Questions about your company or brand might include:

- ✓ How well known is our brand?
- ✓ Will customers buy this product?
- ✓ If we offer X benefit, will our employee happiness go up?
- ✓ Will my product do well in a new market?

Setting a Survey Goal

Define your goal before you do anything else! A goal is not a single learning objective (we'll get to those later). A goal is what you're going to do with the data you collect, and why.

Good Goal: Grow the company into new markets.
A survey will determine which markets are good for existing products.

Bad Goal: Make more money.

Determine Your Learning Objectives

These are the specific pieces of information you want to glean from your survey results, that help you reach your survey goal.

Three is a good number of learning objectives for a single survey.

Don't ever set more than five!

Not sure what your objectives should be? Time to brainstorm!

To come up with learning objectives for your survey we recommend organizing a brainstorm session. It should include anyone who will work on the survey as well as all stakeholders.

- ✓ Let everyone brainstorm on their own separately for 5 minutes.
- ✓ Make sure that everyone gets a chance to have their ideas heard.
- ✓ Have a scribe to make sure you capture all ideas.
- ✓ Let ideas flow freely – no judging!
- ✓ Remember that there are no bad ideas.



Make sure your scribe takes particular note of the ideas submitted by the stakeholders. That way you can be sure to write questions that address their particular needs or concerns.

“None of us is as smart as all of us.
- Kenneth Blanchard”

Question Selection and Refinement

After the brainstorm session, take the ideas and begin the process of turning them into survey questions.

Make sure you're only choosing the questions that you REALLY need to ask. Above all make sure everything ties back to your original survey goal.

Determining Survey ROI (Return on Investment)

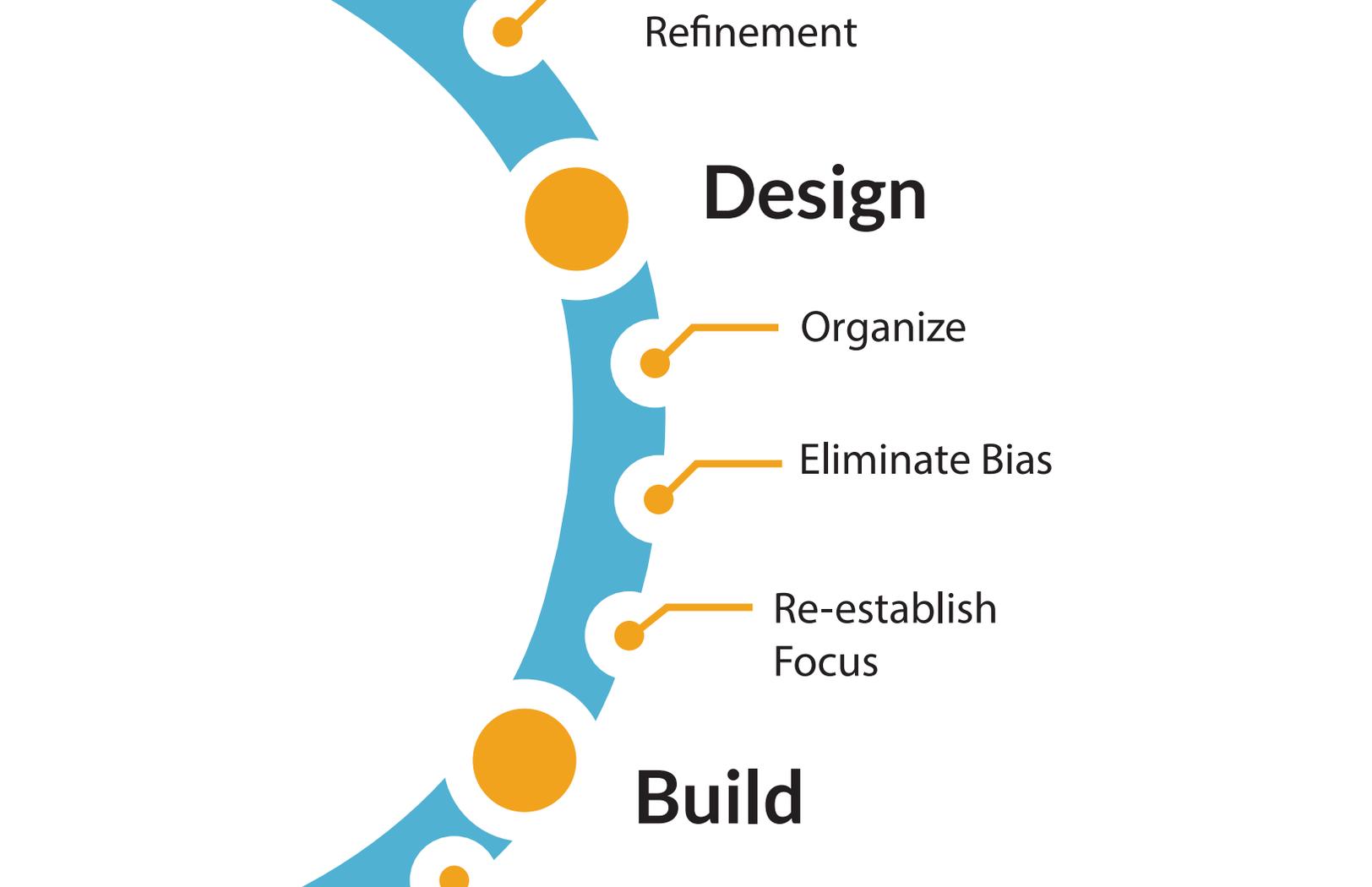
Surveys take time and money. If the cost to conduct it is more than what you will gain from it, than your survey isn't worth running.

If you can't determine the ROI, then there's no incentive to take action on what you learn from administering your survey.

Finally, be sure your results are tied to specific actions. Without this connection, you may find yourself unable to act on the data you collect. This makes your survey just an expense, with no return on the time and money you invested in it.

Why Do Companies Do Surveys?

- ✓ They want to expand into new territories
- ✓ Needs come from the business owners, department managers, or employees themselves
- ✓ Someone wants proof of their intuition
- ✓ Track customer satisfaction levels
- ✓ Compare brand awareness with competitors
- ✓ Measure changes in employee happiness over time
- ✓ Get feedback on new products



Refinement

Design

Organize

Eliminate Bias

Re-establish
Focus

Build

PART 2: DESIGN

CREATING A SURVEY
THAT DOES WHAT YOU WANT?

Revisiting Your Brainstorm

Remember your brainstorming session that helped come up with survey goals and learning objectives?

Time to revisit it.

Organize Your Brainstorm

Identify themes in your brainstorming notes, and use them to group ideas based on objectives and topics. Keep in mind that there may be some additional refinement that needs to be done at this point.

Translation: you may have to throw out ideas that aren't relevant.

Once you have some topics, rank them by priority and categorize them based on how their results could be used in your survey reporting.

Example:

If you are trying to identify who uses your product, group your product questions together before asking demographic questions (toward the end of your survey).



Avoiding The 4 Horsemen of The Surveypocalypse

The goal of this section is to help you design questions that reduce these four common survey problems as much as possible:

- ✓ Lack of Focus
- ✓ Bias
- ✓ Respondent Fatigue
- ✓ Miscommunication

Lack of Focus

Avoiding Lack of Focus

Your survey can lose focus easily if you try to cover too many diverse topics (this is why we suggested limiting your learning objectives to 5 in the previous section). Avoid questions that are not directly in line with your learning objectives.

You should also steer clear of any questions that don't drive actionable results with their data.

Finally, adding questions that you're curious about, but which don't meet the survey goal, can also get your survey off track.

Avoiding Miscommunication

To communicate effectively within your survey, you should be sure that you know your audience and use the language that they use and understand.

Avoid technical terms within your questions, unless they are appropriate and will be understood by respondents.

Define terms in the survey if necessary.

Keep your company's tone consistent if the survey will be coming from your brand.

Finally, make sure to have a peer review your questions for clarity.

Avoiding Question Bias

Bias can sneak into your questions very quickly, and it can wreak havoc on the accuracy of your results.

Here are the most common types of survey bias and how to avoid them.

Emotional Bias

Your own opinions about a topic shouldn't show up in the question content or phrasing.

This most often happens when we ask loaded questions or neutral-seeming questions about a loaded topic.

Example:

Most Americans celebrate the 4th of July. Do you?

Identity Bias

This most often happens when companies are conducting a branded survey about themselves.

Asking "How much do you love SurveyGizmo?" or "Do you like SurveyGizmo?" on a page with the SurveyGizmo logo would create identity bias.

Conversational Bias

While you want to use language that your respondents will understand, you don't want to veer too far into turning your survey into a conversation.

Then you risk respondents giving the answer that they think you want to hear, rather than their actual opinion.

Option Bias

By limiting the types of answers available, you may be creating option bias. Make sure that you avoid:

- ✓ Required, non-applicable questions
- ✓ Leading or restrictive options
- ✓ Different types of scales
- ✓ Massive option lists

Avoiding Survey Fatigue

Survey fatigue is unfortunately a common cultural phenomenon.

Most respondents are tired of the barrage of emails, phone calls, and text messages from retailers requesting them to take their post purchase survey.

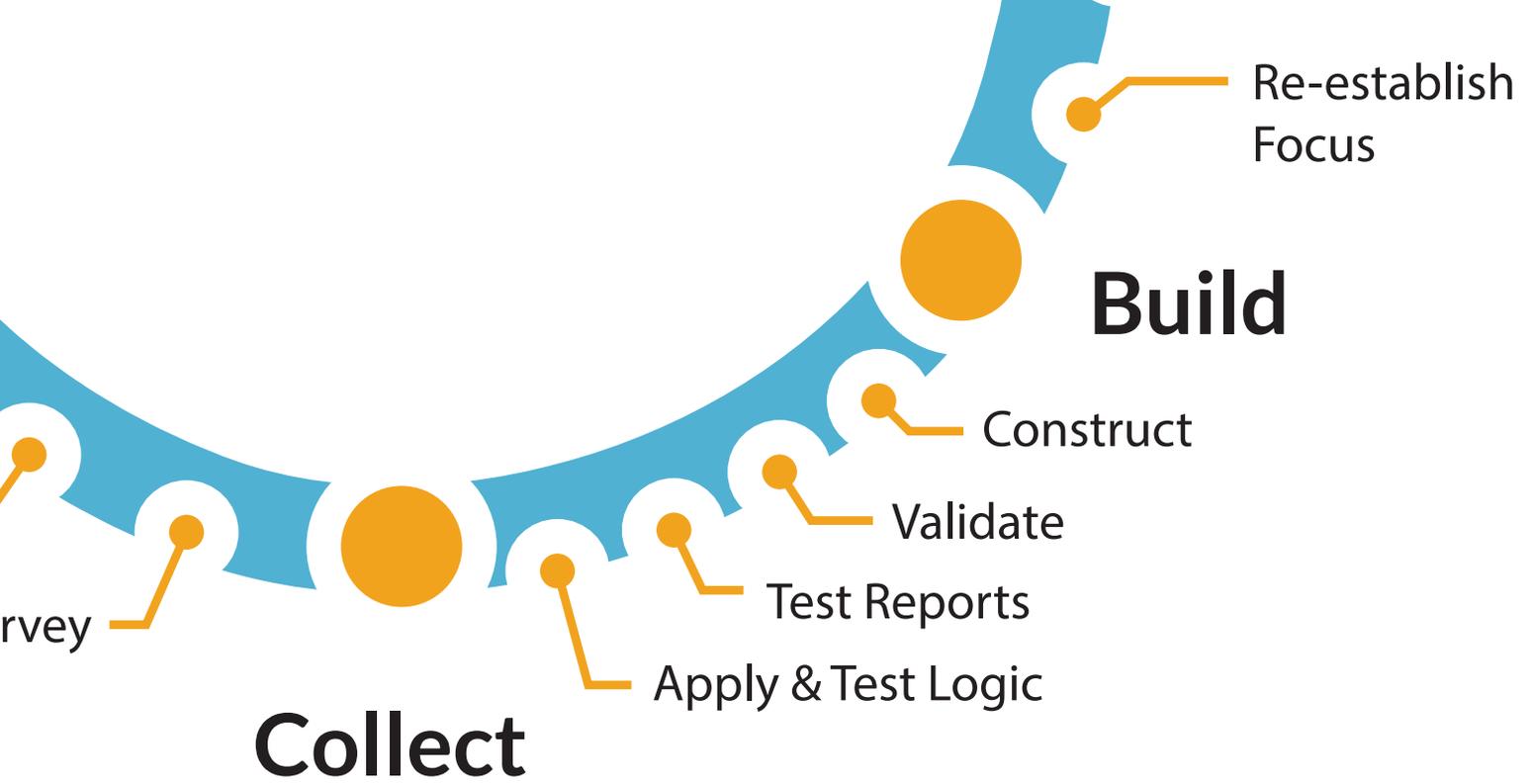
The prevalence of online survey tools contribute to this problem, because it is easy for anybody can create a survey.

Take the time to craft questions that are considerate of your respondents' time and effort (more on this soon.)

Turning Ideas Into Questions

In our next section we'll be diving into question building in more depth, but here are some guidelines to keep in mind while you're turning your brainstorm notes into possible survey questions:

- ✓ Keep questions brief, simple, relevant, specific, and direct
- ✓ Do you want to ask **qualitative questions** (exploratory, usually free-form) or **quantitative questions** (answers are pre-defined)?
- ✓ Make sure your phrasing is relevant to the demographic you're planning to survey.
- ✓ Avoid leading questions, suggestive questions, sensitive topics, highly technical language, and questions that cause survey fatigue.



PART 3: BUILD

TURNING GOALS INTO
REAL SURVEY QUESTIONS

Survey Design and Survey Building

Survey Design

Involves thinking about psychology, emotions, and words.

It is the strategic phase.

During survey design you think about the Big Picture, including your survey goals and learning objectives.

Generally lots of team members chime in, with most stakeholders giving input.

Survey Building

Involves taking into account logistical issues like security walls, logic, survey fatigue, bias, and poor data collection.

It is the more tactical phase.

During survey builds you think about the nitty gritty, including question types, survey length, anonymity, and data analysis.

Generally a small team of 1-3 people builds a survey, though they take stakeholder input into account.

Qualitative Questions

Qualitative questions define a problem. They ask

Why?

If you are exploring a hypothesis, a qualitative survey can identify a problem and its nuances before conducting a quantitative survey.

Qualitative questions are open-ended. Text analysis is required to interpret results and are subject to interpretation bias.

Quantitative Questions

Quantitative questions ask

What? When? How?

These questions quantify a pre-defined problem so you can understand how prevalent a problem is.

Quantitative questions have closed answer options which makes them easier to measure the results.

Qualitative Question Types

Qualitative questions are open text questions. They come in many forms, including:

- Other Box – a word or two
- Comment Box – a few words
- Text Box – Sentence long
- Essay Box – Several sentences

The screenshot displays a survey form with several qualitative question types:

- Other:** A radio button followed by the text "Other".
- Comment Box:** A text input field with the placeholder text "Comment Box".
- Text Box:** A text input field with the placeholder text "Text Box".
- Text Box List:** A section titled "Text Box List" with the instruction "Please provide 3 references below". It contains a table with three columns: "Name", "Email", and "Phone Number", and three rows labeled "Reference 1", "Reference 2", and "Reference 3". Each cell in the table contains a text input field.
- Essay Box:** A text input field with the placeholder text "Describe a professional success you are proud of." and "Essay Box".

Quantitative Question Types

These are the most commonly used quantitative survey questions, and your respondents will know how to deal with them. We'll tackle each one individually on the coming pages.

Radio Button

1. Are you a US citizen?

Yes

No

Check Box

2. Please check the applications you are proficient in:

Word

Excel

PowerPoint

Photoshop

Illustrator

WordPress

Google Analytics

Drop Down

3. Which social media sites do you manage?

-- Please Select --

Likert Scale

4. How satisfied are you with your current work/life balance?

Very Dissatisfied Dissatisfied Neutral Satisfied Very Satisfied

Avoiding Survey Fatigue

In the next few pages we'll be going over common survey question types, showing you examples, and giving each one a Fatigue Rating.

Remember, it's your job as a survey builder to reduce survey fatigue whenever possible while still gathering solid data that your team can act on.

Choose your question types carefully!

Survey Fatigue Ratings



Low Fatigue Rating

Safe to use as much as you like



Medium Fatigue Rating

Use when needed, but avoid if possible



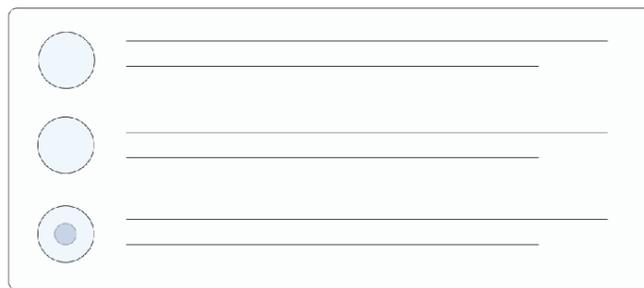
High Fatigue Rating

Danger! Fatigue is imminent!

Question Type: Radio Buttons

Radio buttons are the most common quantitative question type. Use them when you want respondents to select a single answer option.

You can arrange them in a horizontal scale to indicate a ranking, or use a vertical arrangement for categories (as pictured).



Survey Question Tip:

Never include an “All of the above” option in your radio button list. It will wreak havoc on your data analysis!

Question Type: Checkboxes

Like radio buttons, checkboxes typically appear in a list. The difference is that this question type allows for multiple responses.

Which locations have you visited?

- Downtown
- Midtown
- Uptown
- None of the above



**Medium
Fatigue
Rating**

Survey Question Tip:

Allowing respondents to choose more than one option has a BIG impact on statistical reporting!

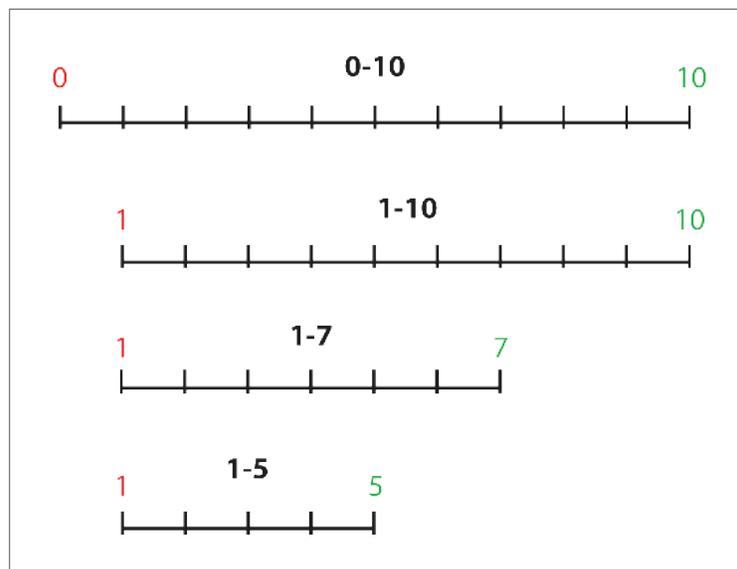
Question Type: Rating Scales

Scales come in many shapes and sizes 1-5, 1-7, 1-10 are common. When measuring customer loyalty, a scale of 0-10 is standard.

Keep in mind that only odd numbered scales allow for a neutral response.

Scales can appear as sliders, which let respondents move them across a spectrum of responses:

Or as a series of horizontal radio buttons that let respondents choose a single option:



Low
Fatigue
Rating

Question Type: Multi-Text

Unlike radio buttons, sliders, or check boxes, multi-text questions collect qualitative data. These exploratory, unguided responses can be used to create lists or rankings.

Please type in the names of survey software companies with which you are familiar. *

- 1
- 2
- 3
- 4
- 5



High
Fatigue
Rating

Survey Question Tip:

Consider using autocomplete so it's easier to analyze the data. It will minimize data clean up.

Question Type: Essays

This is a way to gather unaided, unfiltered responses for your survey.

Reporting on Essay Questions can be challenging. Some tools will help you by creating word clouds of common terms or performing open text analysis, but long form questions really need to be read individually.

3. What is your favorite thing about SurveyGizmo? *



Question Type: Tables

Tables can be a great way to group your survey questions, but they can also become black holes that suck the energy out of your respondents.

Here's the difference:

2. Please list how important the following things are to you in the workplace.

	Extremely Important	Important	Neutral	Unimportant	Extremely Unimportant
How your manager treats you	<input type="radio"/>				
How much you get paid	<input type="radio"/>				
How much you like your co-workers	<input type="radio"/>				
How much you care about your company's vision	<input type="radio"/>				
How profitable	<input type="radio"/>				



High Fatigue Rating

The differences between this table and the one on the previous page are obviously. This one offers only four statements for the respondent to process, all of which are related to the same topic.

If you need to use several tables to gather data, make sure you split them up into topic-driven sections. Separating them with other less fatiguing questions can also help maintain engagement and data integrity.

Please comment on each of the following statements.

	Disagree	Neutral	Agree	Not Applicable
I was greeted with a smile.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The bellman promptly opened the door.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My reservation was correct.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The check-in process was quick.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



Medium Fatigue Rating

General Question Guidelines

Avoid overlapping answer options. Selecting one choice should completely exclude all the others.

✓ Choices do not overlap

How long have you been a member?

- 1-10 years
- 11-20 years
- 21 – 30 years
- 31+ years

✗ Choices do overlap

How long have you been a member?

- 1-10 years
- 10-20 years
- 20-30 years
- 30+ years

Refrain from using double-barreled questions. These combine multiple questions into one which adds confusion and skews your data.

An example of a double-barreled question:

How satisfied are you with our buffet food and drink options?

Provide inclusive answer options for required questions. A forced answer that doesn't apply will taint results.

Validation

Validation is the process of checking your survey to ensure it meets specifications and fulfills its intended purpose.

Validation requires a detailed review of answer options, logic, reporting values, and reporting data to verify that you are collecting quality data.

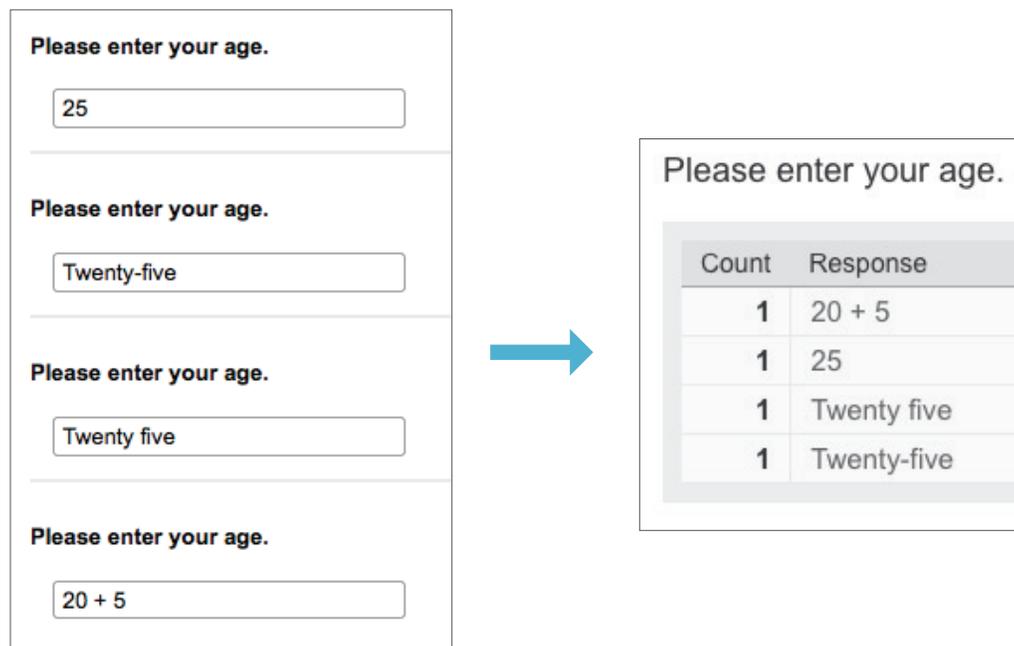
It can be time-consuming, but the benefits you'll see in your data quality make it more than worth the effort!

Validating Your Survey

Validation is a key component of great survey design, but it's often overlooked as people skip straight to testing.

Testing can uncover some problems with a survey, but validation is a more rigorous review process.

Here's an example of how validation can uncover issues with missing answer logic:



Testing Your Survey

Testing your survey entails taking your survey on the different devices that your respondents will be using to ensure it displays and flows correctly.

Advanced survey tools provide a testing feature that quickly generate test data so that you can look at the results to see if it reports as you expected.

Still, you should have stakeholders, colleagues, and friends take your survey for thorough testing.

Run a few reports on the data, then ask yourself these burning survey questions:

- Are your questions reporting the way you expect?
- Are you able to create the reports you need using the data you're collecting?
- Is the data in the format you need?

The Power Of Survey Logic

Logic is a set of conditions that you can apply to a question, answer, or even an entire page of your survey that affects how it performs.

For example, you might ask if your respondents had an appetizer last time they were at your restaurant. If they answer "No," you could use logic to skip them past all the questions about appetizers.

Survey logic is extremely powerful, and its benefits come in two flavors:

Fatigue Fighting

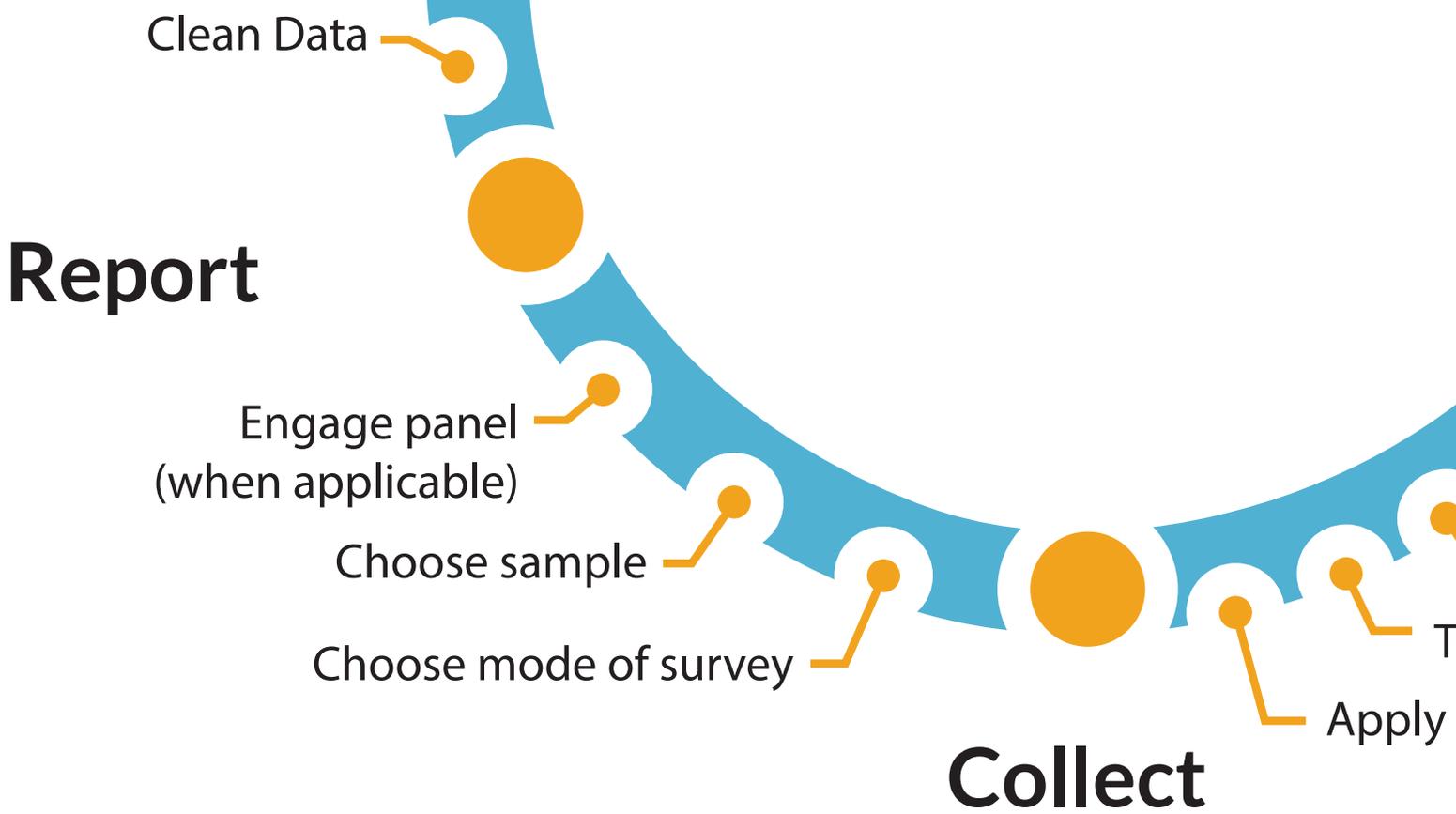
Keeps respondent engaged by showing them only questions relevant to them.

- Page-jumping
- Show-when logic
- Percent branching
- Piping (aka repeating)

Bias Fighting

Avoids any bias that might come from your question content or order.

- Randomization
- Disqualifiers
- Survey timing
- Vote protection



PART 4: COLLECT

GET ANSWERS TO YOUR
CAREFULLY CRAFTED QUESTIONS

Survey Mode: An Important Choice

The way that you distribute your survey can introduce different forms of bias, so how you collect data is important!

Consider your target audience and determine the best way to reach them.

Will you:

- Conduct an phone interview?
- Distribute your survey via social media?
- Send an email invitation to an existing email list?
- Seek targeted responses from a panel company?
- Intercept customers in person?

Survey Distribution

To collect quality data, you need to survey your target audience. Surveying the wrong audience (population) will give you the wrong answer.

If you are not targeting your current customers, than you are surveying a sample of the population.

A **sample survey** is a study that obtains data from a subset of a population, in order to estimate population attributes.

The purpose of sampling is to reduce the cost and/or the amount of work that it would take to survey the entire target population. A survey that measures the entire target population is called a census.

-Wikipedia

Customer Distribution Tips:

Don't survey entire customer list.

Reduce survey fatigue by soliciting a portion of your list.

Depending on your goal you may want to use a random sample or segment it.

Segment Customer list:

- New vs. long time customer
- By plan level
- Random sample

Market Distribution Tips:

Define your target audience.

Ask demographic questions:

- Use disqualifying logic to ensure respondents meet your qualifications.
- Consider a focus group or panel company to find qualified respondents

Collecting Data: Definitions

Population: Represents the entire group of individuals for which you are trying to draw conclusions.

Sample: A sub-group of the population, chosen using statistically valid means, in order to represent the population as a whole.

Segmented Sample: A section of a population.

Response Rate: The number of people who answer the survey divided by the number of people in the sample.

Survey Samples

When conducting a survey, you have two options: survey EVERYONE, or survey just a percentage.

As a general rule, you should always choose a sample of the population to survey. Here's why:

- Surveying everybody is VERY expensive.
- You would contribute to the growing problem of cultural survey fatigue.
- No matter how hard you work, you will miss certain segments of the population.
- Using a statistically valid sample is just as effective.

What's the right sample size?

The number of responses you need for statistical accuracy depends on:

- How accurate you want your data to be (the margin of error or confidence interval).
- How repeatable you need the results to be.
- How large your total population is.

OR...400

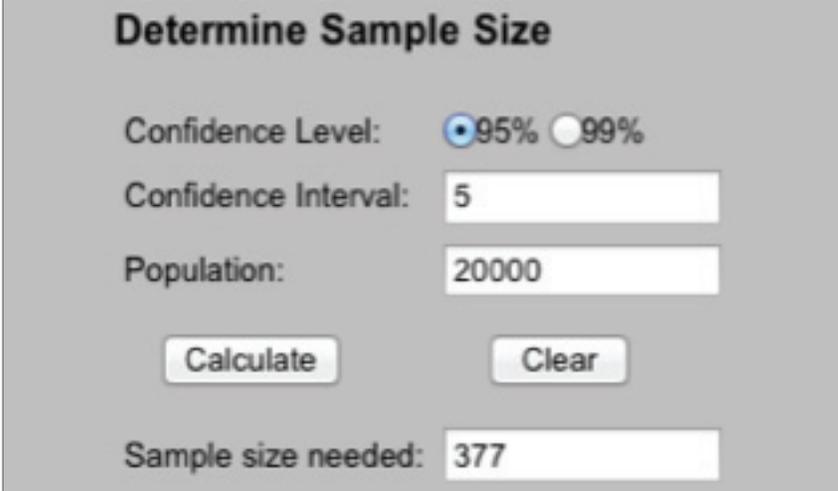
Surveying more than 400 people, regardless of your total population size, doesn't increase your statistical accuracy. Generally you never need to survey more than 400 people for a single survey.

Sample Calculators

For those looking at a sample size smaller than 400, you can use a sample size calculator. These tools will use your total population, along with your desired confidence level and confidence interval, to suggest a statistically valid sample size.

The confidence interval, also called margin of error, is used to indicate the reliability of an estimate. If you use a confidence interval of 5 and 60% of your sample picks an answer you can be confident that if you asked that question to the entire population between 55% and 65% would pick the same answer.

The confidence level represents how often the percentage of the population who would pick an answer lies within the confidence interval. In the above example, a 95% confidence level means you can be 95% certain that 55-65% of respondents would pick an answer.



The screenshot shows a web-based calculator titled "Determine Sample Size". It features the following elements:

- Confidence Level:** Two radio buttons are present, with "95%" selected and "99%" unselected.
- Confidence Interval:** A text input field containing the number "5".
- Population:** A text input field containing the number "20000".
- Buttons:** Two buttons labeled "Calculate" and "Clear" are positioned below the input fields.
- Result:** A text input field at the bottom labeled "Sample size needed:" contains the value "377".

More on Sample Audiences

If you're segmenting your sample data for comparison, you need to make sure that the segments that you are using for comparison are the same as the segments in the represented population.

For example, when comparing men and women in the United States, you would need to make sure that the ratio within your survey data was the same as the ratio within the larger US population.

Finding A Survey Audience

Option 1: Your Own List

You can pull respondents from your existing email list of customers, but DON'T use your entire customer base.

If you distribute surveys with any regularity you will very quickly reach survey fatigue in your entire population, and you may alienate your customers.

Remember, if everyone has the same chance of being randomly selected, you are not biasing your results in any way.

Option 2: Panel Companies

These organizations sell anonymous survey responses to marketers and market researchers (and anybody else who needs them).

Option 3: Incentives

You can offer incentives to gather responses from the larger population yourself, but this tactic can introduce bias into your survey.

People may not take the survey seriously, or the type of incentive you offer may attract certain types of respondents more than others.

To protect your data, use these safeguards:

- Use a page timer with disqualification (responses don't count if they are done too quickly)
- Create shorter surveys
- Add red herring questions (i.e. Answer "C" to this question. Disqualify anyone who doesn't follow the instructions.)
- Clean your data! Good survey software can do this for you, or you can review it yourself for suspicious patterns like straight line answers.

Act

Final Report

Analyze Data

Run Initial Reports

Clean Data

Report

Engage panel

PART 5: REPORT

TURN YOUR RESPONSES
INTO INSIGHTFUL DATA

Quality Data

When you have reliable data, you can be confident that you're building decisions on a solid foundation.

For optimum reliability, you need to clean your data to identify outliers before you start analyzing it.

This process helps ensure all of your data is relevant (and comes from a real person who cared about taking the survey).

Cleaning Data: Warning Signs

Here are the top five warning signs to be on the lookout for when reviewing responses:

#1: Suspicious Answer Patterns

2. Thinking about future visits to our site, how likely are you to do the following?

	Very likely	Somewhat likely	Neutral	Somewhat unlikely	Very unlikely
Get product information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Get how-to information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Find contact information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Look for store locations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Use message boards/forums	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Read a blog	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Comment on a blog	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Watch a video	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Register for an email newsletter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Post a photo	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

2. Thinking about future visits to our site, how likely are you to do the following?

	Very likely	Somewhat likely	Neutral	Somewhat unlikely	Very unlikely
Get product information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Get how-to information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Find contact information	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Look for store locations	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Use message boards/forums	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Read a blog	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comment on a blog	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Watch a video	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Register for an email newsletter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Post a photo	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

#2: Very Fast Completion Times

If you're using a survey timer, be leery of responses that come in well under the average time.

#3: Choosing All Checkbox Options

1. Where did you purchase our product(s)?

- Web site
- Company store
- Retailer
- Discount store
- Catalog
- Warehouse (Costco, Sam's, etc.)
- Other

#4: Red Herring Fails/Logically Inconsistent Answers

Remember when we suggested you throw in some questions to make sure people were paying attention? This is why.

1. In order to ensure that the data collected in this survey is consistent, it's very important to put security checks in place to show that respondents are engaged in the survey. Please choose the last answer in this question.

- Yes, I do
- No, I do not
- Sometimes
- Occasionally
- I would never do this

#5: Nonsense or Missing Open-ended Answers

4. Do you have any other questions or comments?

Fruit banana apple service great
marshmallow okay fine yes fruit salad
cucumbers good wonderful!

Preparing Data For Analysis

Now that your data is clean, it's time to prep for analysis. Hopefully you identified any inconsistencies in responses options during the validation phase, but if not, keep an eye out for inconsistent numerical values and any breaks in validation that arise.

Whatever problems you find, be sure that you don't introduce a new source of bias by changing the question text AFTER you've collected responses.

Dealing With Qualitative Data

Prepare options for how you'll deal with your qualitative data from open text or essay questions.

Some good options are:

- Tracking keyword frequency, or how often particular terms are used by all your respondents
- Word clouds, a handy visualization of the words based on how commonly they appear in answers.

They look like this:



- Rate each response as positive or negative based on the emotional words being used.
- Bucket responses with an open text analysis tool. This software feature will let you categorize responses when they use a certain term or phrase.

Run Preliminary Reports

Remember those learning objectives from Part 1? Now's the time to pull them back out again.

You'll want to run an individual report for each learning objective in order to determine the "highlights" of the data you collected as it relates to future actions.

This way you can truly understand the most significant findings of your research.

Based on each report, determine what actions you'll be recommending for each learning objective.

Preliminary Reports Should Determine:

- If you got your original questions answered.
- If the data is in the format you expected.
- Whether you're seeing the expected trends.

Data Types To Consider

Depending on the purpose of your survey, you may collect demographic details about your respondents, firmographic data, or both.

Demographic data: the statistical characteristics of human populations (such as age or income) used especially to identify markets.

Firmographic data: Characteristics of an organization (such as size or location of a company)

Often your survey will contain demographic and firmographic questions so you can create segments in your survey and reports.

These segments should remain the same from start to finish of the survey process.

Are You Seeing A Trend

When you have data that isn't statistically sound but is still interesting, you can call it "**directional data.**"

This data gives you an idea of what your population is saying, thinking, or feeling, but you cannot use statistics to back it up.

Analyzing Your Data: Ratios

If you collected too many responses from a certain segment of the population, sometimes you will need to adjust the weight of your responses in order to keep it true to outside ratios.

For example, if the population of the US is 52% women but your respondents were 54% male, you'll need to make some adjustments if you want your results to accurately reflect the real ratios of the US population.

Report On Your Findings

There are four stages of the reporting process, during which you reveal the brilliant findings of your well-designed survey to the world.

Stage 1: Write a summary

Stage 2: Write a mini-report for each individual learning objective

Stage 3: Reveal interesting and unexpected trends

Stage 4: Conclusion

Stage 1: Write A Summary

- What was the ultimate goal of this survey?
- Who was surveyed?
- Who was the population?
- Who responded?
- Include basic highlights of the survey audience and your data to introduce the findings.

Stage 2: Write Mini Reports

Each learning objective gets its own mini report so you can specifically address the goals and outcomes for each one.

The last section for every learning objective report should include the recommended actions to take based on the results of the survey (these should not be a surprise!)

Stage 3: Interesting & Unexpected

While optional, this stage can lay the groundwork for future projects and reveal things about your audience that you weren't specifically investigating.

- Good- to-know, not need-to-know
- Maybe you found a new segment of your population that could help you to make good business decisions going forward
- This is going the extra mile!

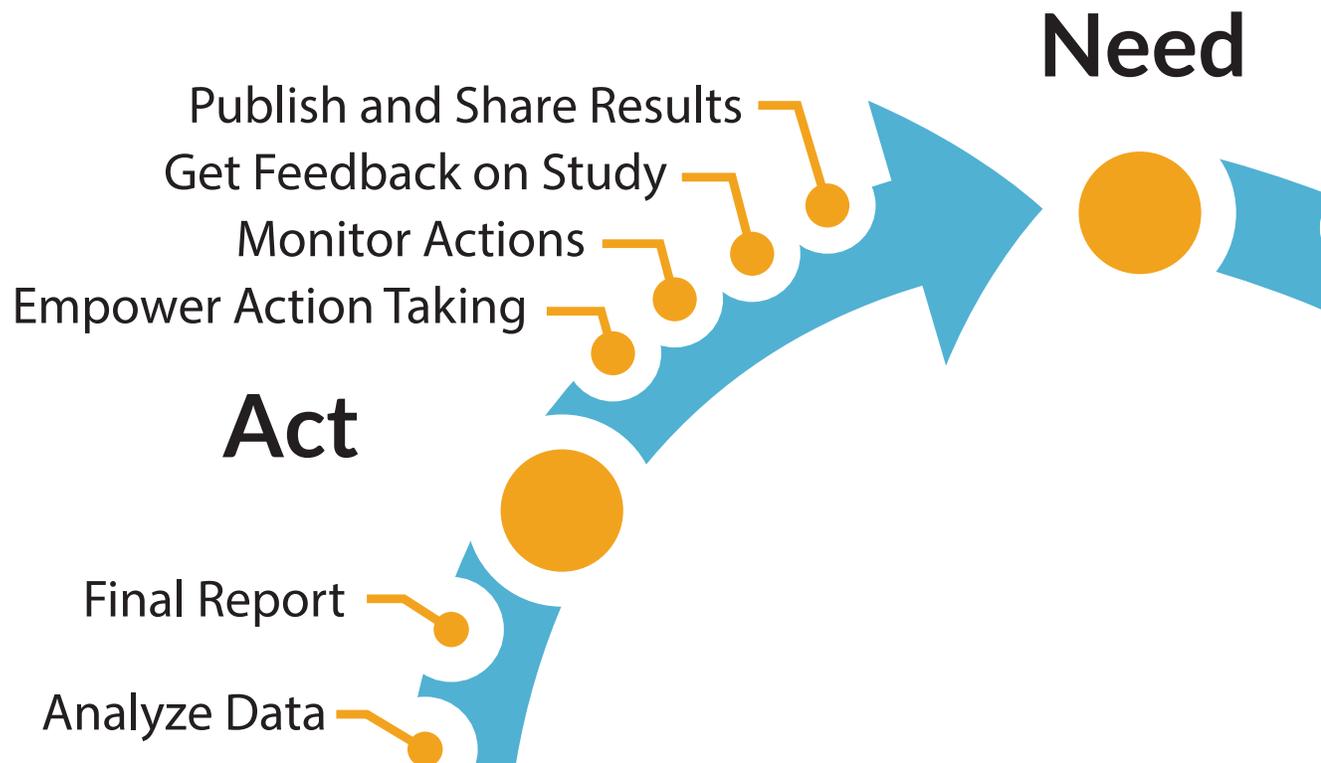
Stage 4: Conclusion

- Recap what actions are going to be taken (if any) based on your findings.
- Get all stakeholders to agree to those actions
- Create a survey to be sent to stakeholders in order to gain feedback for the project and put actions in motion
- Important for the next stage, Act: ask stakeholders to provide metrics that can be used to measure the success of the actions that will be taken

Tips For Communicating Data

Having the best data in the world isn't very useful if you can't convey its value.

- Understand your audience and their interests
- Try to be brief
- Keep your report and findings clear
- Have more than one clear course or possible way forward with the data
- Include data visualization to convey key points
- Try to anticipate questions about the reports
- Know the details
- Be honest



PART 6: ACT

TAKE YOUR SURVEY LESSONS
AND GET GOING!

Actions: Key To Success

Your survey isn't a success until you act on the results.

If you created an action plan prior to launching your survey and got stakeholder buy-in, acting on the data shouldn't be an issue.

Motivate stakeholder not implement changes based on the results.

It can be helpful to establish a reasonable timeframe in which actionable results (positive or negative) can be expected.

Assign actions to individuals and set due dates and an order in which to complete the tasks.

Monitor Actions: Be A Pest

This is where the metrics from the reporting phase come into play.

Invite yourself to meetings, offer yourself as a resource to stakeholders and creative teams as someone with a deep understanding of the data (and follow through!).

Measure Actions

Note when changes were implemented and start measuring results.

What impacts have the changes made?

For instance:

- Has shipping time improved?
- Are customers more satisfied?
- Has revenue increased?

Getting Feedback On Your Study

This feedback should be in the form of a short survey that goes out to all stakeholders in order to get their input on the effectiveness of the study.

Ask for any suggestions they may have so that you can work better together in the next study and improve the process.

Look at the information as valuable data for you to show that you've done your job well!

Getting Started On Your Next Project

- The survey you send to stakeholders should be very short!
- Take all of the data on the study – highlights, final financial information (ROI), and actions that were or will be taken.
- Add any changes that will be made moving forward based on the feedback you received.

Measure Actions

Note when changes were implemented and start measuring results.

What impacts have the changes made?

For instance:

- Has shipping time improved?
- Are customers more satisfied?
- Has revenue increased?

Ready to put your new survey knowledge into action?

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