

Survey Essentials

• SURVEY YOUR CUSTOMERS TO GROW YOUR BUSINESS •

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• GETTING STARTED •

What is a survey? A survey is a close examination of someone or something. It's a purpose-driven conversation that occurs on a massive scale.

One of the most common survey types is a customer satisfaction survey, but there are other types as well: employee satisfaction surveys, market research surveys, and more.

So, why conduct a survey? Conducting a survey can help you identify opportunities for your business, identify where you can improve, and get a more holistic sense of how your customers feel about your product or service.

You don't need to be a mathematician or a social scientist to conduct a survey. Surveys are for everyone!

• PLANNING YOUR SURVEY •

There are four major steps involved in planning your survey. Before you can dive in and start creating your survey, you should first: determine what type of survey you'll conduct, set a goal for your survey, think about who you'll send your survey to, and devise a plan for how you'll analyze your survey data.

SELECTING YOUR SURVEY TYPE

Use the survey types listed above to decide what type of survey you'll conduct. Will you run a customer satisfaction survey like Sarah or will you opt for a different type?

 **Your turn: Write down what type of survey you will conduct.**

SETTING A RESEARCH GOAL

Your survey should aim to accomplish one research goal, such as: *I want to learn how I might be able to improve my product.* The more specific your research goal, the more you can gear your questions toward accomplishing that goal and the better your data will be.

 **Your turn: Write down your research goal.**



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Then, think about your subgoals. Since you'll build your survey questions out of these, they should be more specific. For example, if your research goal is to figure out how you can improve your product, your subgoal might be: *How happy are customers with the price of my product?*

 **Your turn: Write down 2-3 subgoals.**

DEFINING YOUR AUDIENCE

In order for your survey to be successful, you need to make sure you're sending it to the right audience. For example, if you're looking to conduct a customer satisfaction survey, your target audience should be your customer base. You might even narrow this down to customers who have purchased your product in the last several months.

 **Your turn: Describe the target audience for your survey.**

DEVISING AN ANALYSIS PLAN

Finally, you should consider how you'll analyze your data after you conduct your survey. In addition to looking at your topline results, you might want to cut the data into subgroups (e.g. you might want to look at how women responded in comparison to men).

 **Your turn: Write down how you will analyze your survey data.**

• TYPES OF QUESTIONS •

Listed below are some of the most popular question types for surveys. For a more comprehensive list, check out [SurveyMonkey's list of question types](#).



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Multiple choice: A question type that allows respondents to select one answer from a list of answers. Be sure to keep your list of choices manageable — opt for ten or fewer options so as not to overwhelm respondents.

Checkbox: A question type that allows respondents to identify multiple attributes of your company and select more than one response. This enables respondents to convey nuanced opinions. Again, limit the number of options here.

Dropdown: A question type that allows respondents to select an answer from a dropdown list of possible responses. You might want to use this type of question if you need to present more than ten responses (e.g. countries, states, dates, etc.).

Concept test: A question type that allows you to have your respondents test a concept. For example, you might want to decide which image to use for an ad campaign. You can present several image options to your respondents and have them vote for the one they like best.

Matrix: A question type that allows you to ask several questions with the same response options at once. For example, you might ask your customers to rank several words on a scale of how well or poorly they describe your product. Since this question type doesn't always display perfectly on smartphones, try to limit your matrix to five rows by five columns.

Open-ended question: A question type that allows respondents to type out their response in a text box. Since it is difficult for people to fill these out on their phones, try to use this question type sparingly.

• WRITING YOUR QUESTIONS •

Now it's time to actually draft your survey questions! Keep the following tips and tricks in mind as you draft your questions.

Make your questions as user-friendly as possible. Try to utilize more close-ended, multiple choice questions than open-ended questions.

Make sure your questions are clear and concise. To do this, avoid using acronyms and jargon, ask about only one concept at a time, and make sure open-ended questions are as precise as possible.



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• WORKING WITH LOGIC •

To take your survey to the next level, consider building **skip logic** into it. With skip logic, you can direct respondents to certain questions — and have them skip over certain questions — based on their previous responses.

Skip logic allows you to customize your survey and make it more relevant to each individual respondent. For example, if a respondent rates your shipping above average, you should allow them to skip a question about how your shipping process might be improved.

 **Your turn: Where might you incorporate skip logic into your survey?**

• PROGRAMMING YOUR SURVEY •

Now that you've established your research goals, drafted your questions, and considered how you might incorporate logic into your survey, it's time to actually build your survey. Whether you're using **SurveyMonkey** or another program, go ahead and enter your questions.

 **Your turn: Build out your survey in your program of choice! If you decided to utilize logic, be sure to build that into your survey.**

• DESIGNING YOUR SURVEY •

Another important consideration to keep in mind as you build your survey is how your survey will look. Follow the best practices outlined below.



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Incorporate your brand into your survey. Be sure to include your brand colors and your logo in your survey to keep your respondents thinking about your company.

Check your visuals. Check your survey to make sure that your visuals aren't distracting. Keep your logo small, omit any distracting images, and break any long blocks of text.

Design for accessibility. Ensure that you're using colors and fonts that are accessible to all respondents. Make sure whatever font you're using is simple and easily readable.

 **Your turn: Design your survey. Add in your logo, brand colors, and other elements.**

• TESTING YOUR SURVEY •

Before you can send your survey out into the world, you need to make sure it works as you intended. You should test your survey on both a desktop and on a smart device, such as a mobile phone or tablet. (Since $\frac{1}{3}$ of US respondents will respond on a mobile device, this is a step you won't want to skip!)

To test your survey, send the link to friends and have them test for clarity, grammar, and logic. You should also send the link to yourself to test your survey out on your own devices.

 **Your turn: Send your survey to your friends (and yourself) to test it out.**

• SETTING SAMPLE SIZE •

The final step you need to take before distributing your survey is figuring out how many respondents you'll need to complete your survey. This is known as **sample size**.

Your sample size will depend on what kind of decision you're hoping to make with your survey data. If you're going to make a decision from the data that will require you to spend a lot of money, your sample size should be relatively large (i.e. several hundred to 1,000 people). But if you're just trying to better understand what your customers think about your company, your sample size can be smaller (i.e. 50 to 100 people).

 **Your turn: Write down your sample size below.**



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MARGIN OF ERROR

Since there is no way to survey everyone, all surveys will contain some amount of error. You can combat this by being conscious of your sample size. As your sample size increases, your margin of error decreases.

To calculate your margin of error, use [SurveyMonkey's margin of error calculator](#).

 **Your turn: Calculate your margin of error and write it down below.**

• SENDING YOUR SURVEY •

You've finally made it! It's time to send out your survey and start collecting responses. There are several routes you can take when it comes to distributing your survey.

DISTRIBUTION OPTIONS FOR YOUR SURVEY

- Send via email (with a link or via an email collector like [MailChimp](#))
- Send via text
- Share the link on social media
- Send via Facebook Messenger
- Share via physical QR code
- Print and share PDF copies of your survey

 **Your turn: How will you distribute your survey?**

WHEN TO SEND YOUR SURVEY

It's also important to consider when you'll send out your survey. The majority of your responses will come in within 24 hours of you sending out your survey, so you want to be sure to send your survey out at a time that's convenient for people to respond.

Most people tend to respond in the morning when they get to work, right around 9 AM. Participation takes a dip when people break around lunchtime, and then rises again in the afternoon. In the late afternoon and evening, however, participation decreases again.

 **Your turn: When will you distribute your survey?**



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WHAT IF PEOPLE AREN'T RESPONDING?

If you send out your survey and don't get the response rate you hoped for, don't worry! There are steps you can take to increase participation in your survey.

Option #1: Send a reminder email. Remind people to take your survey by sending out an email to people who haven't yet responded. You should see about a 10% boost in response rate every time you send a reminder email.

Option #2: Offer an incentive. Encourage your customers to take your survey by making it worth their while. Offer an incentive, like a \$50 Amazon gift card to a random respondent.

• COLLECTING QUALITY RESPONSES •

Before you can analyze your response data, you need to make sure that the data you've received is high quality.

First, ask yourself: *Do you have enough responses to base a business decision upon? Do the demographics of your respondents match the demographics of your customers?* If the answer to either of these questions is no, then your data is probably not great quality.

Catch (and filter out) biased data by looking for:

- Speeders, or people who appear to have gone through your survey too quickly
- Responses to open-ended questions that are random gibberish instead of helpful, thoughtful responses
- Straightlining on matrix and checkbox questions (i.e. when respondents select the same answer every time or select all available answers)

• ANALYZING YOUR RESULTS •

It's finally time to analyze your survey data! Listed below are several ways to go about analyzing your data.

DATA ANALYSIS OPTIONS

- **Topline data analysis:** Focuses on individual results and raw percentages, without filters or deep dives



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- **Crosstabs, filtering, or compares analysis:** Drills down into one or two different groups and looks at comparisons across groups
- **Correlations and regression analysis:** Focuses on how multiple factors are related to one another — note that most people do not need to conduct this type of analysis

WHEN ANALYZING YOUR DATA, KEEP IN MIND...

- **Correlation doesn't always equal causation.** Often, two things seem related when they're actually not.
- **Watch your base sizes.** When you're filtering data, you might drill down into small sample sizes. Make sure your sample sizes are large enough to give you valid data.
- **Results can change over time.** What was once true might not be true forever. For this reason, it's important to think about running your survey again in the future to see what, if anything, has changed.

 **Your turn: Based on your survey data, what is the answer to your research question?**

 **Your turn: What did you learn from your survey data?**

