



## 7 STEPS TO SURVEY SUCCESS

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Your customers have opinions. You need to know what they are. Polls and surveys are a great way to find out what they are thinking

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# 1. DEFINE YOUR OBJECTIVE

Why are you creating this poll or survey?

Do you want to learn something about your clients? Or do you want their opinion on something? Do you want to capture their contact information? Or do you simply want to create a fun, interactive poll to engage your audience?

Each survey or poll should have one specific objective.

The goal of this poll or survey?

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How many responses

If you are conducting the study to determine trends or define product specifications you will need a fairly large number of responses for the information to be statistically significant. (100 or more) If you are simply looking for a general impression or a chance to increase engagement, just a handful of responses will suffice.

In general, for short email surveys, you can expect 10 – 20% of your list to respond if you have a strong permission based list. The longer the study, the fewer responses you are likely to get.

☐ We want lots of responses

☐ We want fewer, higher quality responses

# 2. DEFINE YOUR AUDIENCE

Don't just go in blind. Every business should know their audience, but when you're creating a poll, it's especially important. It doesn't make much sense to ask a 14 year old how much they're likely to spend on a car or ask a man if he's influenced by the packaging of cosmetics.

Will you be surveying your entire community, or a narrow segment such as new customers, loyal / frequent customers, prospective customers, or customers who only use a specific product or service? Targeting your survey or poll allows you to ask more specific questions and gain insights which can be translated into specific actions.

**Who is your target for this study?**

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### 3. CHOOSE THE QUESTION FORMAT

There are a number of different types of closed-ended questions you can use to collect data including:

- **Dichotomous** or two-point questions (e.g. Yes or No, Unsatisfied or Satisfied)
- **Multiple choice** questions (e.g. A, B, C or D) Where people can select some or all of the responses
- **Scaled questions** that are making use of rating scales such as the Likert scale (i.e. a type of five-point scale), three-point scales, semantic differential scales, and seven-point scales

#### The benefits of closed ended questions:

- Easy to answer
- Easy to analyze and allow for great comparison
- Ensure scales are balanced and clear

#### Multiple Choice Examples: Which city is your favorite?

- a. Indianapolis                      b. Seattle                      c. Boston                      d. St. Louis

#### Things to consider with multiple choice questions:

- Limits responses and participants may not like any of the choices
- You can also run into a too many option dilemma.
- You can always offer the “other” option. Do so sparingly, or you will lose the ability to tabulate your results.

#### Scale Question Example: On a scale of one to five, how much do you agree with the following statement?

Indianapolis is the best city in the world.

Strongly Disagree (1) ----- (2) ----- (3) ----- (4) ----- (5) Strongly Agree

#### Scale Question tips

- Often times, respondents can be scared off with an “all or nothing” question. This provides them the ability to rate something on a scale of 1-10, 1-5, etc., without feeling like they necessarily have to commit to something
- Odd number choices, 3, 5 or 7 allow people to “fence sit” not really giving you a clear answer.
- Even numbers 2, 4 require people to take a stand on one side or the other.

## The benefits of open ended questions

- Not limited by options - The respondent has complete control over what they want to say.
- You get deeper insights, more qualitative insights

## The challenges of open ended questions

- Harder to answer = respondent fatigue
- Harder to analyze, time-consuming to evaluate
- Limit comparison

### **Short answer Example: What do you enjoy about living in Indianapolis**

## What do you want to know?

Polls are limited to 1 or two questions. Surveys can be longer but should be limited so the completion time is under five minutes. People want to give their opinion, but they don't want to take all day doing it so keep your survey short. Every question should have a specific purpose or action associated with it. If you don't know what you will do with the data point, don't ask the question.

Keep the survey short by limiting the total number of questions. Also, open ended, fill in the blank and general comment questions take more time, so include no more than 3 open questions in your study.

### **Other question tips:**

- Make the first question easy to answer
- Put most important questions early in a longer study
- Ask profile & demographic questions last. Be sure to explain why you need the information. Keep it simple and unless it is absolutely necessary, don't make these questions mandatory
- Double check your wording to avoid leading or confusing questions

## What will you ask?

The simpler the question is, the more direct the answer will be which means the clearest results. Brainstorm a few questions to include in your next study.

1. \_\_\_\_\_
2. \_\_\_\_\_

## 4. CHOOSE YOUR PLATFORM

### Social Media Poll

Facebook, Twitter, and Instagram each have polling features you can easily integrate with your post.

- Twitter offers polls directly in the “New Tweet” box.
- If you simply search “Facebook Poll” in the Facebook Search Bar, you’ll find different integration options.
- Instagram allows polls on Stories, and you’ll have to add a poll “sticker.”
- Unfortunately, LinkedIn does not offer polling options at this time.

There are plugins like TryInteract.com which allow you to integrate images and lead capture into your social media polling. The advantage of a social media poll is the ability to place the poll where people are hanging out already. You can simply poll your community or boost the post to reach a wider audience.

### Email Poll or Survey

Most popular email marketing tools now include polling and survey options. The two most common, Constant Contact and MailChimp allow you to distribute polls to people who already subscribe to your newsletter or via a link to a wider community. New participants can be offered a chance to join your email list.

- Constant Contact has a drag and drop polling process while Mail Chimp requires you to create HTML code and then imbed it into an email – Typically polls are limited to one or two questions.
- Constant Contact also has a full blow survey tool which integrates with email but can also be used as a standalone survey product. See notes in survey tool section below.

### Form Tools

If your objective is to collect contact information and simple responses, without a lot of additional analysis, form tools provide an easy way to conduct simple surveys. Examples include: Formstack, Ninja Forms, Formlets, and Google Forms.

Simple question types such as multiple choice, rank ordering, and open ended questions can all be used. Answers can be downloaded into a simple CSV or excel document for analysis.

These tools allow you to customize and brand the designs and often embed the questionnaire right into your website. Many of these tools require a subscription.

## Survey Tool

When you want to be able to dive deeply into the data, compare sub segments to the entire community, or run complex cross tabs then you will need a more robust survey tool.

Examples include SurveyMonkey, Constant Contact survey tool and SurveyPal. These tools include prebuilt questions and simple reporting tools you can use as is, or customize for your purpose. This can save time as you build new, longer studies.

Which survey platform will you use?

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## 5. CREATE AND LAUNCH THE POLL

When you are ready create the poll. Always double check your work. Get a grammar fanatic to look over your work – remember, this is going public; you don't want any typos or errors detracting from the purpose.

**Create a distribution plan.** Decide if you will simply post in your timeline or invest a little in a social media boost to reach a wider audience.

**Consider an incentive for participants.** This doesn't have to be cash; it can simply be a chance to win something or a copy of the final report

**Don't forget the thank you page.** This page should make people happy they took the time to give you feedback. This page can include a link to a download, or information on how to claim their incentive, or even an "extra surprise".

**Establish a close date** so you can begin analyzing the results. Typically a social media poll should run no more than a few days, while an email survey should remain open two weeks, but you will typically collect 88% of the total responses within one week.

If you are not satisfied with the number of responses consider resending the email to people who did not open the original request or pinning the post to the top of the social media page.





## 6. ANALYZE YOUR DATA

Start by downloading the data into a spread sheet. Check for any anomalies or misunderstandings. Look for responses which are clearly outliers. If there is too much fluctuation you may want to follow up with people to be sure they understood the question. You may even have to conduct a follow up study to get more clarification.

If you have strong consistent agreement, the plan of action becomes obvious. Other time you may want to create graphs or charts to see patterns in the data.

## 7. NEXT STEPS

Now, the real work begins. If you tied each question to a particular course of action it is easy to start implementing the strategies which will improve your marketing or products.

And once you have the plans in place you can start thinking about your next survey.