Bright Ideas

Finding the "Truth"

Using surveys to find out what people really think

In a world where people feel surveyed to death, it is becoming much harder to get people to help organizations make good decisions. But until somebody invents a way to extract opinions directly from people's brains, surveys are one of our main tools. So how do we maximize our chances of getting good information using survey technology?

A good survey is one in which questions are inviting, clear and related to what we want to find out. An inviting survey encourages people to take time out of their busy lives to answer questions in a thoughtful manner. A clear survey encourages people to interpret the question the same way as others and, in particular, as we did when we created the survey. A survey's questions should tell us what we need to know to make good decisions. Let's look at some of the principles to follow in order to achieve these gold standards of surveying.

Getting to Yes

The first step is to get people to agree to answer our questions, regardless of whether we are conducting the survey face-to-face,

over the phone, by mail or online. People are more likely to give us their time if they

* Trust in the integrity of the request

* Feel that decisions related to the topic have an impact on them

* Believe that their input will make a difference in our decisions

Before the first question is asked, the introduction to the survey must satisfy the potential respondent that the survey is not simply a marketing gimmick. Generation X and Y are particularly cynical about such possibilities. Lately I have noticed a number of phone surveyors starting the conversation by saying that they are not trying to sell anything, which will work as long as marketers do not start to claim that they are not marketing anything.

An introduction to the survey should describe the purpose in fairly general terms that will attract the interest of those we want to respond, even if there is a "hot topic" that we *really* want to know about 10 minutes into the survey. The purpose of describing the survey topic more generically is

> *People respond to your survey only if they trust you to listen and act accordingly.*

to ensure that those who respond are representative of the full range of the population, not just those rabidly interested in the key issue. The survey designer must walk the fine line between describing the survey so generically that potential respondents do not care enough to complete the survey and describing the key issue so specifically as to lose representativeness.

Past history affects whether potential respondents feel their input will make a difference. Government or high-profile industry surveys achieve good or poor rates of return based on whether people trust them to listen and act accordingly. History makes a difference even if the surveyor is a third party.

The other main factors affecting whether people respond are time and timing. A short survey (single sheet of paper, regardless of size, or 10 minutes to complete) is more likely to be answered than one that looks time-consuming. Time of year is also important. It is hard to collect information from people in December or the summer months. People feel overcommitted in the holiday season and are simply not available during vacation time.

The Truth is Clear

There is an art to writing clear and unbiased questions. The penalty for failure to do so is public mistrust and unwillingness to respond in future. Although it is impossible to cover all the principles of good design, here are a few key points:

- Avoid wording that suggests that one answer is better or more socially acceptable than another.

- Rating scale descriptions should be balanced between positive and negative options, regardless of whether a "neutral" point is included or not.

- Use the simplest wording possible, in particular in phone surveys where memory constraints are greater.

- Put demographic questions at the end unless you are using them to ensure a proper balance of gender, age, etc.

With respect to this last point, we want information from as many people as possible even if we do not have responses to sensitive questions, such as income; it just means we will have more limited data for analysis of whether opinions differ by income categories. However, if such sensitive questions appear first, some people may simply stop responding or fail to submit their survey, so all of their opinions are lost to us.

The best strategy for ensuring that survey questions are clear and unbiased is to run them by others. Ask people to reword the questions; this will flag misinterpretations. Have them identify biased questions and suggest alternatives.

While We Have Your Attention…

There is something about getting people to answer questions that unleashes surveyors' desire to get as much information as possible, regardless of whether it is relevant to the research question or not. And often in the flurry of devising questions whose answers would be interesting to know, they lose track of the decisions the survey was supposed to inform. As a result, the survey gets longer and less useful. Because it is less useful, the results make suggestions that are irrelevant and unlikely to get the buy-in needed for implementation. People feel less "heard" and less likely to respond to future surveys.

Make every question count. Review each proposed survey question and identify what information the answer will provide and how it will answer the research question or inform decisions that the organization plans to make. Make sure that every research question has survey questions that address it adequately. Finally, although survey techniques are useful, they cannot answer all our questions and we may need to draw on other sources of information (e.g., cost analysis, outcome measures) to inform our decisions.

Is this a cool world, or what?

We've reached the part of the fall that is easily mistaken for winter and I am increasingly thankful for technology that allows me to do so much business from the relative comfort of my office. Thanks to conference call technology, many of us no longer have to risk our lives on bad roads to collaborate. Using chat-based meeting software, we can even have a written record of the conversation and who volunteered to do what. Reports are now delivered electronically so we don't have to trudge through the snow to the post office or courier.

Business has been conducted at the speed of light for awhile. But we now have social media tools that let us work and collaborate from just about anywhere with a notebook computer (or even an iPhone or Blackberry). I am currently working on a project where we use a free password-accessed online space to share and collaboratively edit documents (with access to past and present versions, in case we decide we prefer the way it was before), task lists (with assignments and due dates), and messaging. How cool is that!

K. K. Biersdorff Consulting supports organizational excellence and innovation through an array of planning, research, communication and training services that take projects seamlessly from start to finish.