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The Lessons Learned

An in-depth informative paper on the online survey process.

Example of points discussed in this document:

- Careful planning is vital to any survey's success
- Reminders are an effective tool that stimulate response
- Anonymity increases the accuracy of data
- Set your deadline a week earlier before you need the results, so you have time to extend it if your target response rate is not yet reached.
- Running a survey once will give you a snapshot of what you are looking for, but running a survey multiple times will give you a historical capture and much more useful data.

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Introduction

Lessons Learned

"Attempt the end, and never stand to doubt;
Nothing's so hard but search will find it out."
Robert Herrick – Hesperides, Seek and Find, 1648

When it comes to surveys, there is more involved than merely jotting down a few simple questions and asking random people. There are three basic but mandatory steps involved in organizing a successful survey: planning, composing, and running. In order to maximize the response rate and usefulness of responses, careful planning combined with the proper knowledge is a necessity.

The Lessons Learned white paper is the result of in-depth data harvesting . It reflects a generalization of how people have responded in the past and can be used as a guide while you create your survey. Throughout the document, each step is addressed individually with detail about the actions necessary to complete each step.

Part I

Planning your Survey

"It is thrifty to prepare today for the wants of tomorrow."
Aesop - The Ant and the Grasshopper

In the construction industry, successfully building a safe, reliable, and sturdy structure requires that blueprints always be designed first. The same applies to building surveys. Before you begin writing questions, create your own "blueprint". Write down the goals you wish to accomplish by running this survey. Then, decide on the type of survey you wish to create. Finally, decide on the degree of anonymity you wish to maintain. Successful planning is a necessary step for a successful survey.

First, write down your goals. By writing down your goals, you have a defined point of focus. Sticking to your goals while you write your survey will help keep your survey more refined. Also, it will help you to obtain an optimal length and avoid including things that don't necessarily relate to what you're trying to accomplish.

Next, you must choose which type of survey is right for your needs. There are three main types of surveys: Knowledge Acquisition, 360, and Team Rater. Which one is right for your needs depends on your goals.

Knowledge Acquisition surveys are polls. They involve harvesting the opinion about an item, and are very one-dimensional. If your goal is to obtain the opinion about an event, goal, idea, etc., then a general Knowledge Acquisition survey is right for you

A 360 survey is designed to help staff members gain a better understanding on how they perform from multiple perspectives. It involves 2 groups of people: participants and respondents. First, the participant completes a self-evaluation; then chooses people that he/she feels could provide useful feedback. Those people, called respondents, complete the survey giving feedback to the participant. If your goal fits with "I would like to help individuals gain a better understanding of their performance from multiple perspectives and how it compares to their self-evaluation," then perhaps a 360 survey is right for you.

The Team Rater is like a 360, only it is targeted to a team, a group of people who work together. It is designed to help gain understanding on how team members compliment each other. Each team member completes a survey for every other team member, but unlike the 360, they don't complete a self-survey. If your goal fits with, "I would like to help a team better understand how they compliment each other, giving them knowledge of areas where they can improve", then the Team rater is a great solution for you.

Finally, you need to consider how anonymous you would like the respondents of your survey to be. Anonymity is important because it greatly reduces bias. People are instinctively concerned with what others may think of the feedback they give, so they pad their response to conform to expectations. When people know that their responses are going to be kept anonymous, they are more likely to give honest feedback. Keeping the results anonymous will enhance the quality of the feedback received.

Keep in mind, however, there are certain circumstances where anonymity is not possible and can be dismissed. In the case of a 360 survey, for example, anonymity from the manager is sometimes impossible as some individuals only have one manager. In this case, it is ok to have the manager’s response not anonymous; it is generally a manager’s job to communicate the performance of the individual he or she is manager over. However, you should still maintain anonymity for other relationships in a 360 survey.

Part II

Composing your survey

"I have a new method of poetry. All you got to do is look over your notebooks . . . or lay down on a couch, and think of anything that comes into your head, especially the miseries . . . Then arrange in lines of two, three or four words each, don't bother about sentences, in sections of two, three or four lines each."
Allen Ginsberg, 1952

Now that you've properly planned for your survey, it's time to get down to business and compose it. To compose a survey, you need not only to write questions, you also need to craft effective invitation and reminder messages, as well as a welcome and a finished message. If you are running a 360 survey, you'll need two versions of each: one for the participant, and one for the respondent (the person giving feedback for the participant). To ensure these items will obtain optimal results, there are several critical elements to be considered.

When composing your questions, compose them as if you were asking them face-to-face. Additionally, you should always follow these important tips.

- To preserve anonymity, avoid demographic questions that will reveal the identity of the respondents.
- Avoid acronyms, jargon, and abbreviations. If your audience doesn't understand the question, they can't respond to it correctly.
- Avoid ambiguous questions and or vague words that have multiple meanings. (Example Here)
- Write clear, specific questions that are to the point, discarding unnecessary words. For example, don't write questions that contain multiple thoughts. Instead of "Does he perform well on the job and promptly meet deadlines", break it down to two questions: "Does he perform well on the job" and "Does he promptly meet deadlines".
- Avoid questions with an unbalanced response scale. For example, rather than the scale "Disagree; Agree; Strongly agree", use "Strongly disagree; disagree; Neither disagree nor agree; Agree; Strongly agree".
- Questions should never contain double negatives. Instead of "His comments in meetings aren't unnecessary" use "His comments in meetings contribute to the agenda".
- Get to the point and stay with it. Write questions that are relevant to your goal. It is important to maximize the usefulness of your audience's time, your audience should be able to clearly see an association between the purpose of the survey and the questions asked.
- Keep the survey short. Try to keep it between 25-40 questions, taking no longer than 20 minutes to complete.

Another thing to consider is the order that your questions are asked in. You may wish to randomize them to help eliminate bias. One advantage of Internet-based surveys is that LearningBridge can do this automatically for you—each participant will see the questions in a random order, something not possible to do in paper-based surveys.

When composing your invitation and reminder messages, welcome and finished screens, there are some important elements to consider. Each message should be informative, short, and personal. Paying attention to these things will contribute to the success of your survey.

- Invitations and Reminders should include the following:
- E-mail Subject Line - This should contain the purpose of the e-mail summarized to a few words. To create a sense of urgency, use the words RESPONSE REQUESTED or FEEDBACK REQUIRED. Putting words in capital letters helps them stand out more
- From-Address - You can specify the e-mail address the invitations come from. For Knowledge Acquisition and Team Rater type surveys. For 360 survey types, the address 'help@learningbridge.com' is most often used, but for respondents you should use the participants email address. The respondent e-mail invitation is more likely to be read if it is from someone that the respondent knows, rather than from LearningBridge. If you type '[participantEmail]' for the from-address, LearningBridge will automatically insert the participant's e-mail address when invitations are sent.
- Deadline - The survey deadline should be near the top of the e-mail body, people will be more likely to see it. Additionally, putting 'YOUR FEEDBACK MUST BE SUBMITTED BY' in all capitals will help the deadline stand out more.
- Anticipated time to take survey – It is courteous to predict how much time the survey will take. If your survey involves lots of typing (comment responses), you may wish to give audience estimated time to complete multiple choice answers and direct answers only, and inform them that the comments will take longer.
- Purpose of Survey – Communicate to your audience what the feedback will be used for, and how it will affect them. For example, "This feedback will be used to help evaluate our team efficiency and will not affect your grade." If this invitation is for a 360 and directed to a Respondent (somebody giving feedback to a Participant), then you should include "You are providing feedback for [ParticipantName]."
- Anonymity – Briefly tell your audience if the responses are anonymous. If there are circumstances where they are not anonymous, it is important to tell your audience before hand where their answers will not be held anonymous.
- Include Instructions – In 360's, instruct your participants to complete the self-survey before adding respondents (people who give feedback to participants). This allows the participant to be familiar with the content of the survey before deciding whom he or she will invite to give feedback.
- How to access survey – Tell them to go to www.learningbridge.com. Put their e-mail address in the body of the message as their login, and be sure to include their password.

Next, compose the welcome screen and finished screen. The welcome screen should just welcome them to the survey and give a brief insight to the survey. Also, if applicable, survey instructions or definitions of terms could be included on this page.

The finished screen should express appreciation for their feedback. If applicable, inform them when they'll get there results, and include any additional instructions for them here.

It is important to keep the messages personal. People are much more responsive to messages that are personalized. Consequently, use gender specific pronouns (he/she) and names wherever applicable. The LearningBridge message editor has a “variables” feature that makes this easy to do.

Keeping the messages short should be another goal when designing custom messages. People tend to skim through messages and miss important information if they are long.

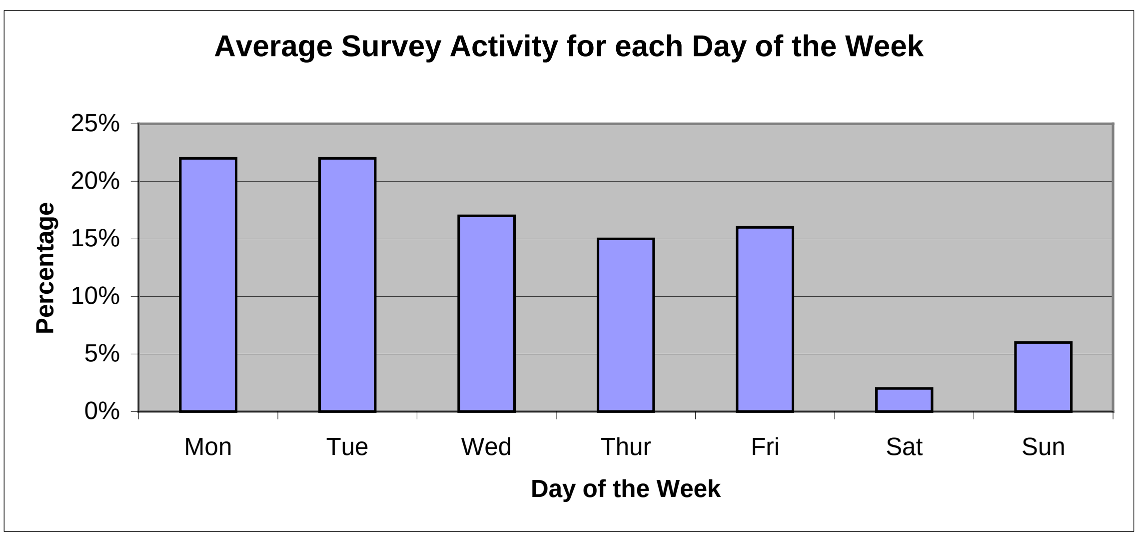
Part III
Starting your Survey

"Are you lost, daddy?" I asked tenderly.
"Shut up," he explained.
Ring Lardner – The Young Immigrunts.

All right, you've got this beautifully composed survey that has been planned from start to finish, you've carefully written the questions, and you're probably excited to get it running. Now, all you have left to do is to set an invitation date, a deadline date, set some reminder dates (or an interval, if you prefer), and invite the right people to come take your survey. Sounds easy, right? It is, but there's a little science behind getting a good response rate.

First, let's begin with setting an invitation date. A common misconception in the survey world is that Mondays are a terrible day for to send out invitations. The reason behind the misconception being people are just getting back from a 2-day break from work, they have a million messages and things to do to catch up. Consequently, they are far too busy to pay attention to a little invitation in their inbox inviting them to give feedback.

You might also look at it the other way around—There are equally as many people that are just getting to work from a break after they've put their projects to a stopping point the Friday before. They're refreshed, ready to go, and have time to deal with other things before they pick up their major projects again. Still not convinced? Look at this chart:

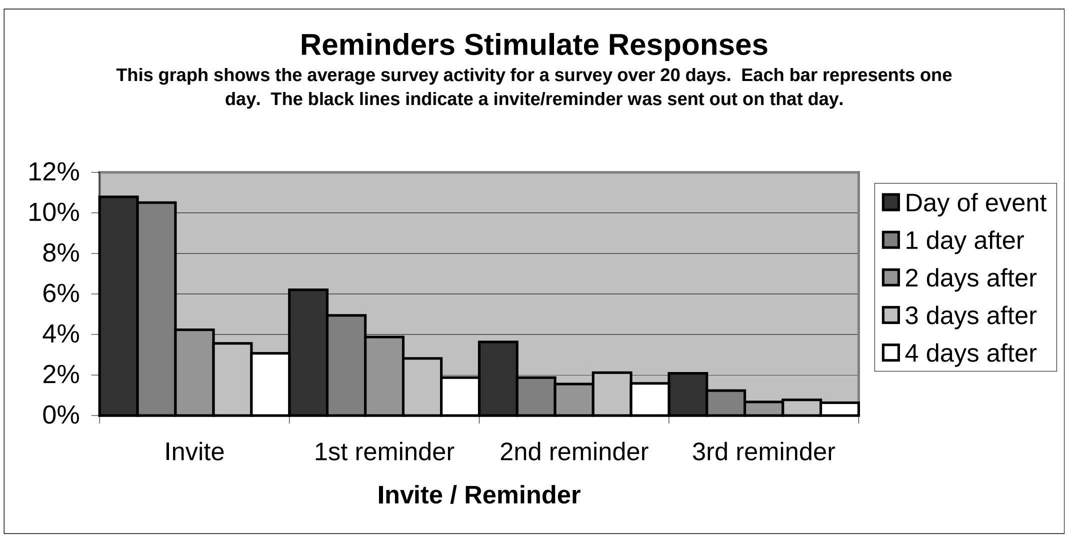


The graph above represents survey responsiveness as we've experienced throughout the past year. Notice how Monday's percentage is right up there with Tuesday's? What does it all mean? Simply said, you should send your invitations so they have arrived when people get to work on Monday. However, be sure to use your own judgment—there may be other circumstances of your target audience that you may wish to take in to consideration, such as a major project deadline coming up.

You should always set a deadline before you start a survey, simply because a survey without a preset deadline will never come to a close. If you want to wait until you get 100% response rate, you'll miss out on valuable weeks where you could be putting that data to use. On top of that, procrastinators will wait until just before the deadline to do the survey, so by setting an earlier deadline you'll get a higher response rate. 2 ½ weeks to 4 weeks has proven to be plenty of time to get a good response rate. Also, closing on a Wednesday is beneficial because it closes after the two most responsive days, Monday and Tuesday.

One trick that has proven to be effective in the past is to set the deadline a week earlier than you need it to be. Then, if you don't have enough data by the time that deadline approaches, extend it by a week. By doing this you give the procrastinators another chance to do the survey, and they will usually come around the second time.

E-mail reminders have also proven to be an effective tool in stimulating response. The truth is, the first time people are told to do something, they often put if off because they're busy with other things. Next, they forget about it. In most cases, they'll need to be reminded a few times before they do it. Take a look at this chart:



This graph shows the average survey activity for a survey over 20 days. Survey Activity refers to the percentage of your audience that completed in a day (For example, if you had 100 people invited to your survey, and 10 of those people completed on the first Monday, then the Survey Activity would be 10%). Each bar represents one day. The black lines indicate a invite/reminder was sent out on that day. Notice how when the invitation is sent out, the greatest response is received, but as the days go by, it quickly drops and approaches 3% by the fifth day. Then, when the first reminder is sent out, the response doubles! The same thing happens for each reminder following. Reminders significantly stimulate responses.

When scheduling your reminder dates, you have two options of how to go about it. You can use set reminder dates—specified dates that reminders will go out.

Another way is to set a reminder interval, so the user is reminded every X number of days after he or she received the invitation to complete the survey. Each has its advantages.

If you choose to set specified reminder dates, space your reminder dates at least three days apart, and schedule them to remind on alternate days of the week (e.g., remind Thursday, Monday, Friday, then Tuesday). Also, avoid sending out reminders on Saturday and Sunday, as these are the least responsive days. The advantage to using specified reminder dates is that you have more control over the survey. Set reminder dates work well for Knowledge Acquisition and Team Rater surveys because all participants and respondents in the survey are usually added on the same day. In a 360 survey, where respondents are added over several days, set dates do not work as well. For example, a respondent might be invited to complete a survey on a Wednesday and then receive a reminder message the very next day, just because that happened to be the set reminder date.

If you choose to use a reminder interval, it should be between three to six days. Five days is an excellent choice and has proven to be work well in the past. Reminder intervals are nice because they're easier to set up and the reminders are set out in relation to the day the respondent was invited. The disadvantage is you don't have as much control.

Finally, invite your audience. The invitations are sent out as soon as you enter an email address, so enter the names and e-mail addresses of the people you wish to respond the night before you want them to get their invitations. This way, they'll get them in the morning, while they are starting their day.

Now that you've set an invitation date, a deadline date, reminder dates or an reminder interval, and have invited your audience, sit back and watch the survey run. You'll get your results a few days after the survey closes.

Conclusion

Interpreting Your Results

"Two wrongs don't make a right, but they make a good excuse."
Thomas Szasz – Social Relations, 1973

When you get the results from your survey, you should use the data as a guide to making decisions. Don't let the data make decisions for you. It is important to keep in mind that the survey process is not perfect, people may not tell the whole truth and survey bias may be in play. You should always temper decisions with common sense and experience.

Also, you should consider running the same survey multiple times. Running a single survey will give you a snapshot of what you are looking for, but running the survey again will give you a historical capture of what your looking for. Being able to see a history of survey results will enable you to see how the actions taken have affected the results.

To maximize the response rate and usefulness of responses, careful planning combined with the proper knowledge is a necessity. We at LearningBridge hope this document has answered your questions about where to begin with starting a survey, and has given you the guidance and knowledge to create a successful survey. If you have any additional questions, follow the "Contact Us" link on our web page at www.LearningBridge.com.