Find out what you need to know about your customers

QuestionPro

FOR DUMMIES®

Discover how to make online research fun!

A Reference for the Rest of Us!®

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Jennifer LeClaire
Co-author of Web Analytics For Dummies

Who We Are

QuestionPro was founded by two software consultants who believe software should make our lives easier. After years in the consulting business, we've experienced the "dark side" of overly complex software. QuestionPro is our take on what software should be, web-based and easy to use. We evolve our business by understanding user requirements and delivering solutions that make your job easier.

Our Mission

We aim to deliver the most advanced features that the online survey market demands while maintaining a balance between flexibility and ease-of-use. Customer satisfaction is our #1 priority and our software constantly improves by taking customer feedback to heart. The success of our company depends entirely on the success of our clients. Our single goal is to deliver a service that makes conducting online research easy.

Our Users

Thousands of organizations worldwide have chosen QuestionPro as their trusted partner for conducting online research. Our technology requires very little technical expertise to produce meaningful surveys and actionable results. Our clients choose our service for its ease of use and advanced feature set. From satisfaction studies, to brand research, to market research, we have the technology to make your project a success.

Social Entrepreneurship

At QuestionPro we also believe in *Social Entrepreneurship* — the strong belief that companies and entrepreneurs have a responsibility to uplift our society as a whole. Within QuestionPro this belief takes the following forms :

Non-Profit Waiver
University Partnership
Student Research Sponsorship
1% For Charity

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QuestionPro® FOR DUMMIES®

by Jennifer LeClaire

Co-author of *Web Analytics For Dummies*

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Foreword

by Gregg Van Ryzin, PhD
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The Internet has transformed the way we live and work. Never in the history of humankind have we had more information literally at our fingertips than we do today. While sometimes it can seem overwhelming, new technology presents amazing opportunities — if you know how to use the tools.

I tell my students that one of the key differences between organizations that succeed and those that don't lies in how well they listen and learn. Successful organizations *listen* to their customers, their employees, their members, and their communities. And they *learn* by carefully analyzing the feedback they get from these strategic partners.

One of the easiest and most effective ways to gather such feedback is with a survey. And Internet-based tools now make it easier than ever for organizations of all sizes to conduct surveys to guide strategy and to make critical decisions.

The fact that you're already reading this book means that you understand the potential that lies inside. So open your new toolbox and begin practicing with some powerful yet easy-to-use tools that can help you and your organization listen, learn, and succeed!

Introduction

Online research can be exciting, revealing, and an exercise in greater profitability for your company — or it can be arduous, time-wasting, and downright frustrating. Your experience depends largely on the tools you use to conduct your online research. QuestionPro was developed to make online research engaging, streamlined, and, well, downright fun. But don't take my word for it. Try it yourself, and use this book as a reference manual to help you streamline your online survey building and promotional processes as you do so.

QuestionPro For Dummies is the book that you've been waiting for. You see, online research gives you an advantage over your competition. It's critical for companies doing business in the 21st century. In fact, from entrepreneurs to mega corporations, the value of online surveys is becoming increasingly apparent and the adoption is growing. What you don't know about your customers could be hurting your chances for success.

About This Book

QuestionPro For Dummies takes the mystery out of online surveys. You find out what you need to do to make QuestionPro work for you. You discover the basic functions of developing and sending surveys, as well as the more advanced tools to measure the response rates of your online questionnaires so you can make future adjustments.

In this book, we show you how to

- Understand online surveys
- Select your target audience
- Prepare effective online questionnaires
- Track respondents

- Create multilingual surveys
- Send your survey to the masses
- Avoid spam complaints
- Analyze your survey results
- And much more!

Most of the instructions assume you're already logged into the QuestionPro Web site.

About QuestionPro

If you haven't heard of QuestionPro before you picked up this book, you need to get ready to shout for joy. You're about to discover how to tap into a powerful tool that is helping thousands of organizations worldwide conduct online research. QuestionPro's technology requires very little technical expertise to produce meaningful surveys and actionable results. Companies turn to QuestionPro because the software is easy to use and offers an advanced feature set. From satisfaction studies, to brand research, to market research and beyond, QuestionPro offers the technology to make your next research project a success.

QuestionPro was founded by two software consultants who believe software should make our lives easier, not more complicated. After years in the consulting business, they decided to escape the "dark side" of overly complex software. QuestionPro is their take on what software should be — Web-based and easy to use. They evolve the business by understanding user requirements and delivering solutions to make your job easier. The success of QuestionPro depends entirely on the success of its clients, which include Microsoft, Yahoo!, 3M, and Texaco, among many other blue chip companies. Be sure to visit the QuestionPro blog online at `http://blog.questionpro.com`.

Foolish Assumptions

You know what they say about people who make assumptions, but because you hold this book in your hands, we have to presume a few things about your present state — such as:

- You own a company, are planning to launch a new venture, or are running an organization that needs answers.
- You know how to use a Web browser.
- You're willing to invest a few hours to gain valuable insights into customer preference and behavior.

Of course, if you picked up a book like this, we have to figure you're more than a little hungry for customer data — or that you're working for someone who is. Because this book deals with online surveys and how to use them to glean revenue-generating insights that thrust you toward your organizational goals, we have to assume that you can take action on what you glean from this book.

This book won't do all the work for you. You have to understand your business model and your organization's specific needs. But it will help you get the answers you need and teach you how to analyze response data so you can take steps to improve your bottom line.

How This Book Is Organized

This book won't put you to sleep. To the contrary, it will wake you up to new opportunities in data mining. But it is organized like your traditional reference manual. You can start with any chapter in the book and get the information you need on the spot. You don't necessarily have to read the chapters in order like you would an action thriller or a mystery novel. What you'll quickly discover is online surveys don't have to be difficult with QuestionPro software. The book is divided into several parts: getting started building surveys, analyzing the results, and, of course, the Part of Tens.

Icons Used in this Book

Like all For Dummies books, this book uses icons to highlight certain paragraphs and to alert you to especially useful information. Here's the lowdown on what those icons mean:

A Tip icon means we're giving you a valuable tidbit of information that may help you on your journey or provide some extra insight into the concepts being discussed.

When you see the Remember icon, take note. That means we're offering information that is worth remembering.

The Warning icon does just that — it warns. It helps you avoid common mistakes, misconceptions, myths, and pitfalls. The bomb symbol sort of gets your attention, doesn't it? Be sure to look for it so you don't do more harm than good as you wade through the world of online surveys.

Understanding Web-Based Software

In a Web 2.0 world, it's no longer necessary to download and install every piece of software. New technology and new business models are seeing the software industry evolve to embrace Web-based services, of which QuestionPro is one of many. Web-based software offers plenty of benefits — it saves you time, slashes your paperwork, and reduces errors. Web-based software offers you anywhere, anytime access to your data. (That means you can launch a survey from your laptop at the poolside!) With Web-based software, the administration duties — including security — fall on the shoulders of the vendor. You have less risk all the way around. These are the key reasons why Web-based software is taking the world by storm.

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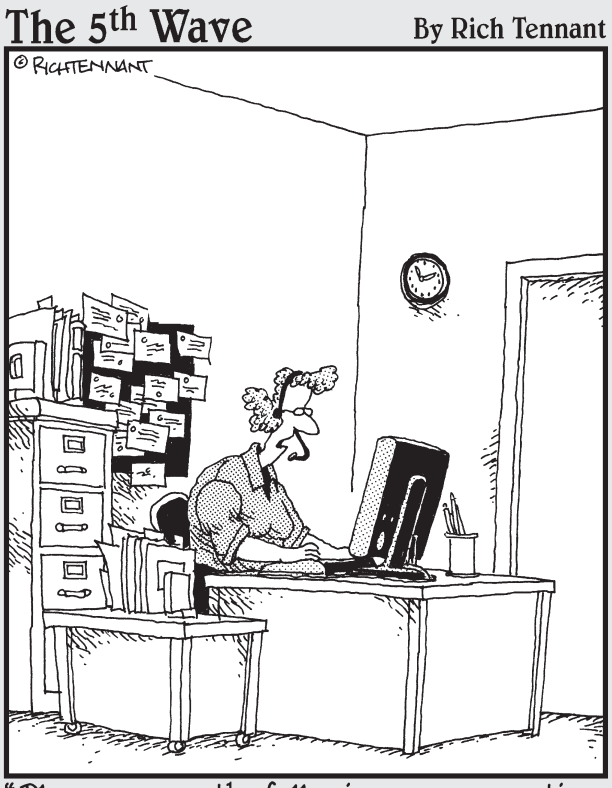
Part I
Getting Started with Surveys



"Please answer the following survey questions about our company's performance with either, 'Excellent', 'Good', 'Fair', or 'I'm Really Incapable of Appreciating Someone Else's Hard Work.'"

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In this part . . .

If you need to know the basics about surveys and survey building, this is the part for you! Chapter 1 answers your common questions about this valuable tool. Chapter 2 and Chapter 3 tell you everything you need to know about survey building. Chapter 4 tells you how to track respondents, while Chapter 5 shows you how to send your survey to the masses.

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Chapter 1

Answering Common Questions

In This Chapter

- Discovering the world of online surveys
- Finding out if online surveys are right for you
- Perusing the benefits of QuestionPro's service
- Selecting your target audience

If your mind is rolling over and over with questions about online surveys, never fear, the answers are here. If you come from the old school of market research, your brain may want to tilt when it sees all the modern technology. But your brain will thank you when you tap into the power of online surveys because it makes your life so much easier. Instead of using your brain power to crunch numbers, for example, you can use it to dig deeper into meaningful insights that will drive results and make you look like the superhero of your organization.

Surveys aren't merely a luxury. They have become a necessity for almost any type of research. Whether it's a *satisfaction survey* (which is a survey designed to measure consumer satisfaction) your boss is insisting you complete by noon, or a complex public health study that'll help you earn your PhD, a Web-based survey is the most affordable window into the world of your subjects.

This chapter opens your eyes to the wonderful world of online surveys of which QuestionPro is a vital part. If you're still wondering what an online survey is, you'll get your

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answer. If you want to know who should use online surveys, we've got that covered, too. Wondering why you should use QuestionPro in particular? This chapter gives you plenty of good reasons. We also share how you can find some helpful resources to make your experience super user-friendly and, finally, we offer you some valuable tips on selecting your target audience. After all, the best questions in the world fail if they don't fall on the ears of the right respondents — the people who complete your survey.

What Is an Online Survey?

Just as you can skin the proverbial cat in many ways, you can also conduct a survey in many ways. You could go door to door with a pen and pad, stand outside your local grocery store with the same, make telephone calls, or do mass mailings through the post office. Or you could do it the easy way — with an online survey. An online survey is just that; collecting survey data electronically from your target audience over the Internet.

Online surveys give you the best of all survey worlds. They're the easiest way to distribute and collect information and the fastest way to create customized surveys based on different target demographics (population characteristics). Online surveys are an anonymous way to get feedback from customers, clients, and partners about products, services, marketing campaigns — and just about anything else. In short, online surveys give the survey creator and the survey taker flexibility, freedom, and convenience.

Who Should Use Online Surveys?

For all the virtues of online surveys, this tool is admittedly not the best solution to every information-seeking mission. Sometimes you need to be in the thick of the action to get the results you need. (Voter polling is a good example.) But for most other companies, online surveys are a viable option for gathering opinions, reactions, and other feedback.

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Ask yourself these questions to determine whether online surveys are the right vehicle for your information needs:

- **Do you want to save time and money?** Paper-based surveys can be costly and time consuming to develop, distribute, and analyze. Online surveys have a broader geographic reach so you don't have to put people on the street — or on the phones — to survey the land.
- **Do you want some quick feedback right now?** Online surveys offer real-time responses. That means you can get play-by-play action on the answers as they roll in. What could be more fun than a "live" look at the results?
- **Do you need to thin slice charts and graphs?** Paper-based surveys demand data input and analysis skills. Online surveys offer analysis tools that do the number crunching for you.
- **Do you want to change course midstream?** After you print your paper-based surveys, you're stuck. With online surveys, you can change questions, delete questions, and add questions as you discover the need.

Online surveys are a great alternative to expensive mail or telephone surveys. There are a few caveats to online surveys, however, that you should know. If you're trying to survey a representative sample of the general population, remember that not everyone is online. And among those that are online, not everyone is willing to take an online survey.

Why You Should Use QuestionPro

With online surveys becoming more popular all the time, a growing number of online survey vendors are vying for their share of the market. So why should you use QuestionPro? For the same reasons Microsoft, Yahoo!, 3M, Texaco, Google, and other leading companies do. QuestionPro is one of the leading providers of online survey services today. From simple Web

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surveys to large, complex, international market research, QuestionPro offers a solution.

QuestionPro's technology requires very little technical expertise to produce meaningful surveys and actionable results. It's a hosted solution that lets companies of all sizes reliably analyze data for their customers. QuestionPro takes you beyond some of the simple survey services out there with sophisticated tools that add real value to the data collected.

QuestionPro never leaves you out in the cold. You'll find comprehensive resources, voluminous help files, strategic white papers, FAQs, articles, and more. All you have to do is click on the "Help" link at the bottom of any page on the QuestionPro Web site and you will be whisked away to the help portal. Visit `www.questionpro.com/help.html` for more information.

Selecting Your Target Audience

You wouldn't ask a 6-year-old which arthritis medicine works the best. Likewise, you wouldn't ask a 66-year-old which pacifier offers the most comfort. In other words, your questions should be appropriate to your target audience in content, tone, and sophistication. You can't reach out to an audience and compel people to respond without knowing whom you are trying to reach and compel.

It may sound simple to select a target audience. After all, you should know your organization's target, right? True, but different surveys seek different information. For example, is your target audience composed of people who have been using your goods and services since you launched them? Is your target some subsection of users, such as women in Ohio, or Latinos, or people who make more than $40,000? The better you define your target for a specific survey, the more accurate your results will ultimately be.

Here are a few suggestions for narrowing your target audience:

- By age, race, gender, or some other demographic
- By geographical location

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- By recreational interests
- By specific behavior patterns, such as how often they do business with your company or how often they buy the product in question from any company

These are just a few of the potential qualifiers that can help you get the precise answers you need from exactly the types of people you're interested in.

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Chapter 2

Everything You Need to Know about Survey Building

In This Chapter

- Gathering the right survey ingredients
- Writing questions that get responses
- Going deeper into online surveys

You wouldn't build a skyscraper — or even a single-family home — without gathering the tools and materials you need to do the job right. The same is true of online surveys. Building a survey that's going to elicit responses that help drive revenue growth at your organization depends on having the right tools and materials. Think of the tool as QuestionPro and the materials as the questions themselves. Of course, you also need to know how to actually build the building, or in this case, actually conduct the online survey.

So what do you need to know about building online surveys? You need to know something about your organization and your respondents, first. Who is your target audience? What are your organization's goals, and what is the particular goal of your survey? Is an online survey the best method of gathering the information you need? These are all questions you should ask yourself before you venture into online survey building. You also need to know how to develop clear, concise questions. There are various different types of questions you could ask, but which are the right ones for your survey?

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In this chapter, we tell you how to prepare for your online survey and about the tools and materials you need to build an effective one, the types of questions you should ask, how to dive in deeper with some advanced options, and how to delete your test data so it doesn't skew your results. So put on your work boots, so to speak, and roll up your sleeves. It's time to begin building.

Preparing to Launch an Online Survey

So, you're ready to conduct an online survey. You've probably got a few questions rolling around in your mind at this point as you explore this cost-effective tool for finding out more about your customers, clients, employees, and partners. The first step is to determine the objectives of your study. The second task is to phrase the objectives as questions or measurements.

If you can't determine your objectives or phrase them as questions or measurements, then you're better off looking at other ways to gather data, such as focus groups. Online surveys tend to focus in on more "quantitative" data collection.

Here are some tips to help you prepare your online questionnaire:

1. **Review the basic objectives of the study.** What are you trying to discover? What actions do you want to take as a result of the survey? The answers to these questions help you make sure online surveys are right for you.
2. **Visualize the relevant information you'd like to have.** What will the output report look like? What charts and graphs will be prepared? What information do you need to be assured that action is warranted?
3. **Rank your answers to Questions 1 and 2 according to the value of the topic.** List the most important topics first. Revisit Questions 1 and 2 again to make sure the objectives, topics, and information you need are appropriate.

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You can't solve the problem if you ask the wrong questions. Taking the time to make sure you understand what you need to discover, how you will organize the data, and what actions you will take when you receive the responses is a vital starting point.

4. **How easy or difficult is it for the respondent to provide information on each topic?** If difficult, is there another way to obtain the information by asking another question?

This is probably the most important step. Online surveys have to be precise, clear, and concise. Due to the fickle nature of the Web, if your questions are too complicated or difficult to understand, you'll have a high drop out rate.

5. **Create an unbiased sequence for the topics.** Make sure the questions you ask first don't bias the results of the questions that come later. Sometimes providing too much information, or disclosing the purpose of the study, can create bias. After you have a sequence of topics, you can create the basic layout of a survey.

Always try to add some introductory text before you start firing off survey questions. Your introduction should explain the project and what the respondent is required to do.

6. **Determine what type of question is best suited to yield the type of answer you're looking for, then provide enough robustness to meet your analysis requirements.** Many question types exist — probably more than you ever imagined — and you must walk a fine line as you decide which ones to use. See the section, "Getting Acquainted with Question Types" for more information on this topic.

Generally, tougher analysis requirements lead to a more complicated questionnaire design. However, a couple of tools are available to make life easier: *page breaks* — a break in the survey that sends you to the next page — and *branching* — a feature that lets you jump to a specified question based on responses to previous questions. In essence, branching serves up different sets of questions to different people. For more information on these topics, see the sidebar "Break or branch? You decide."

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Break or branch? You decide

If you're working on a complex survey, you may wind up with a survey design that's rather intimidating for your respondents — unless you use page breaks and branching. Here's how these nifty tools work:

- *Page breaks* let you avoid having a huge scrolling survey and you can introduce them as often as you see fit. However, there is one caveat with page breaks to be aware of: Don't use too much of a good thing. If you use so many page breaks that you end up with one question per page, it increases the amount of time it takes respondents to complete a survey. That, my friends, also increases the chance for survey drop outs.
- *Branching,* sometimes called *skip logic,* is the second strategy for breaking up complex surveys. This tool makes your surveys smart. You've probably seen surveys that offer directions such as, "If you answered 'no' to Question 1, then answer Question 4." That just causes respondents to get frustrated and increases the drop out rate, right? Using branching automatically routes the respondent to the correct questions based on the previous responses, without making them figure it out on their own.

7. **Write the questions.** As you write your questions, keep in mind that you may need to write several questions for each topic and then select the best one. You may also be better off dividing the survey into multiple sections.
8. **Sequence the questions so that they're unbiased.** Sometimes providing too much information or disclosing the purpose of the study can create bias.
9. **Repeat all of the preceding steps to find any major holes in your survey.** Have someone review it for you.
10. **Time the length of the survey.** A survey should take less than five minutes. You should estimate that respondents will answer about 3 to 4 questions per minute, so you're limited to about 15 questions. Keep in mind that one open-ended text question counts for three multiple choice questions. Most online software

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tools record the time respondents take to answer questions.

11. **Pretest the survey.** Ask 20 or more people to take the survey and offer you some detailed feedback. For the love of Pete, make sure you test your survey (we can't stress this enough).
12. **Revise, revise, revise.** Revise your online questionnaire incorporating the feedback that you receive.
13. **Send the survey.** Congratulations. It's time to send out your survey.

Being the professional that you are, you'll want to include a "Thank You" at the end of the survey, and offer up information about how respondents can find the results when they're published.

Getting Acquainted with Question Types

So you've decided that you need a better understanding of the characteristics of people who visit your Web site, or of some other business-related question. Developing a focused and effective questionnaire helps you to efficiently and accurately pinpoint the information you want to know.

Developing a questionnaire is as much an art as it is a science. And just as an artist has a variety of different colors to choose from in the palette, you have a variety of different question formats that can help you capture an accurate picture of your customers and clients and also discover issues that are important to them.

Dichotomous questions

The dichotomous question is generally a yes or no question, such as: Have you ever purchased something from our Web site? The respondent will simply check "yes" or "no."

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Multiple choice questions

We're all familiar with multiple-choice questions. These consist of three or more categories. Multiple choice questions can ask for single or multiple answers. For example, you could ask the respondent how they heard about your company and offer them seven options. You could then instruct them to choose one answer, three answers, or as many answers as you've included in the list of possible choices.

For this type of question it is important to consider including an "other" category because there may be other avenues by which the person first heard about your site that you might have overlooked.

Rank order scaling

Rank order scaling questions allow a certain set of brands or products to be ranked based upon a specific attribute or characteristic. You might know Toyota, Honda, Mazda, and Ford are most likely to be purchased. You can choose to request that the options be ranked based upon a particular attribute.

The rating scale

A rating scale question requires a person to rate a product or brand along a well-defined, evenly spaced continuum. Rating scales are often used to measure the direction and intensity of attitudes. Here's an example of a comparative rating scale question: Which of the following categories best describes your last experience purchasing a product or service on our Web site? Then you would include a list of options, such as very pleasant, somewhat pleasant, neither pleasant nor unpleasant, somewhat unpleasant, or very unpleasant.

The semantic differential scale

The semantic differential scale asks a respondent to rate a product, brand, or company based on a seven-point rating

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scale that has two bi-polar adjectives at each end. Confused? Here's an example:

Would you say our Web site is:

- (7) Very Attractive
- (6)
- (5)
- (4)
- (3)
- (2)
- (1) Very Unattractive

Unlike the rating scale, the semantic differential scale doesn't have a neutral or middle selection. A person must choose, to a certain extent, one or the other adjective.

The stapel scale

The stapel scale asks a respondent to rate a brand, product, or service according to a certain characteristic on a scale from +5 to -5, indicating how well the characteristic describes the product or service. Here's an example:

> When thinking about Data Mining Technologies, Inc. (DMT), do you believe that the word "innovative" aptly describes or poorly describes the company? On a scale of +5 to -5 with +5 being "very good description of DMT" and -5 being "poor description of DMT," rank DMT according to the word "innovative."

The constant sum question

A constant sum question permits collection of *ratio* data, meaning that the data is able to express the relative value or importance of the options (for instance, that option A is twice

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as important as option B). This type of question is used when you're relatively sure of the reasons for purchase, or you want input on a limited number of reasons you feel are important.

A question, for example, may ask the respondent to divide 100 points between a set of options to show the value or importance he places on each option. The respondent would distribute the 100 points giving the more important reasons a greater number of points. The computer will prompt the respondent if his total doesn't equal exactly 100 points. Here's how it looks:

When thinking about the reasons you purchased our TargetFind data mining software, please rate the following reasons according to their relative importance:

Seamless integration with other software	_____
User friendliness of software	_____
Ability to manipulate algorithms	_____
Level of pre- and post-purchase service	_____
Level of value for the price	_____
Convenience of purchase/quick delivery	_____
Total	100 points

The open-ended question

The open-ended question seeks to explore the qualitative, in-depth aspects of a particular topic or issue. It gives a person the chance to respond in detail. Open-ended questions are important; however, use them sparingly unless you expect to execute a qualitative analysis study.

The demographic question

Demographic questions are an important part of your questionnaire because they identify characteristics such as age, gender, income, race, geographic place of residence, number of children, and so forth. Demographic data helps you paint a

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more accurate picture of your target audience. Perhaps most of your customers come from the northeast, are between the ages of 50 and 65, and have incomes between $50,000 and $75,000.That's important to know, don't you think?

You'll also find psycho-graphic or lifestyle questions in the template files. These questions go a step beyond your typical demographic data to provide an in-depth psychological profile and a look at activities, interests, and opinions of respondents.

Developing Questions That Get Responses

Developing questions that people will answer is an art. Like all art, writing strong questions demands plenty of work and patience plus feedback from others. But beware! Plenty of pitfalls exist on the road to developing winning questions. You must be careful about so-called loaded questions, misplaced questions, confusing questions, and other potential problems that could cause your survey to be a big flop. These are the most common problems you'll face as you set out to develop your questionnaire.

Avoid loaded and leading questions

Just the slightest word changes can produce vastly different results. "Could," "should" and "might" may sound almost the same to you, but interchanging these words could produce a 20 percent difference in agreement to a question. Strong words that represent control or action, such as "prohibit" produce similar results (for example, "Do you believe that Congress should prohibit insurance companies from raising rates?") Sometimes wording is just biased (for example, "You wouldn't want to go to Rudolpho's Restaurant for the company's annual party, would you?")

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Misplaced questions

Questions placed out of order or out of context should be avoided like the plague. To keep free of this disease, use a funnel approach. Here's how it works: Put broad and general questions at the beginning of the questionnaire as a warm-up. Then add in more specific questions, followed by more general, easy-to-answer questions, such as questions that relate to demographics.

Mutually nonexclusive response categories

Multiple choice response categories should be mutually exclusive so that the respondents can make clear choices. Nonexclusive answers frustrate the respondent and make interpretation difficult at best. You could wind up with answers that aren't accurate if you aren't careful to avoid this trap.

Nonspecific questions

"Do you like orange juice?" may seem clear to you, but the question isn't specific enough to offer much information. There are many different aspects of orange juice to like or not to like, such as taste, texture, nutritional content, amount of Vitamin C, the current price, concentrate, fresh squeezed. The lesson here: Be specific about what you want to know. "Do you like the taste of orange juice?" is a much better question.

Confusing or unfamiliar words

Asking about caloric content, bits, bytes, MBs, and other industry-specific jargon and acronyms can be confusing. Make sure your audience understands your language level, terminology, and above all, what you're asking.

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Nondirected questions give respondents excessive latitude

"What suggestions do you have for improving tomato juice?" The surveyor hopes to get information about taste, but the respondent may offer suggestions about texture, the type of can or bottle, mixing juices, or something related to use as a mixer or in recipes. So just go ahead and ask "What suggestions do you have for improving the taste of tomato juice?"

Forcing answers

In some cases, the respondents may not want to — or may not be able to — ante up the information requested. Privacy is an important issue to most people. Questions about income, occupation, finances, family life, personal hygiene, and beliefs (personal, political, religious) can be too intrusive and the respondent could reject them. If you force the answers, you may be forcing them to drop out of your survey.

Non-exhaustive listings

Do you have all of the options covered? If you're unsure, conduct a pretest using the "Other (please specify) _____" option. Then revise the question making sure that you cover at least 90 percent of the respondent answers.

Unbalanced listings

Unbalanced scales may be appropriate for some situations and biased in others. The balanced scale is more appropriate when measuring alcohol consumption patterns, for example. You might use a quantity scale that makes the heavy drinker appear in the middle of the scale. The extreme opposite ends of the scale, in this case, would reflect no consumption and an impossible amount to consume. An unbalanced listing would

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be appropriate for a hospital, however, because we expect all hospitals to offer good care. In that instance, you might use a scale of excellent, very good, good, fair. We don't expect poor care.

Double-barreled questions

What is the fastest and most convenient Internet service for you? That's what they call a double-barreled question. Because the fastest is most likely not the most economical, you should ask two questions instead of one.

Dichotomous questions

When you use dichotomous questions, make sure answers are independent. For example, the question "Do you think of basketball players as being independent agents or as employees of their team?" Some believe that, yes, they are both. You should therefore use two different questions.

Long questions

Multiple choice questions are the longest and most complex. Free text answers are the shortest and easiest to answer. When you increase the length of questions and surveys, you decrease the chance of receiving a completed response.

What Types of Questions Should I Ask?

You could ask many different types of questions — probably more than you even considered when you set out to develop your questionnaire. So how do you know when to ask what question?

Despite all the different question types, you will run into some more often than others in the world of online surveys. These are single and multiple choice questions, open-ended text,

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comment box, and matrix table. Understanding these four staples will take you a long way on down the path of a successfully answered survey:

- **Single and multiple choice questions:** This is a set of question types that only allow respondents to choose from a pre-defined set of answers.
- **Open-ended text:** If you aren't sure what in the world your respondents will say, you can rely on the open-ended the question to let them express themselves freely and get more thoughtful and meaningful feedback.
- **Comment box:** Comment boxes are customary to online surveys. This is essentially an open-ended text box with multiple lines to allow the respondent to comment.
- **Matrix table:** No, not the movie. You use the matrix table type question when you want your respondent to rate a list of dimensions against a list of attributes. For example, it's common to ask someone how important timeliness is in relation to her satisfaction with ordering a meal at a fast food restaurant. For an example, take a look at Figure 2-1.

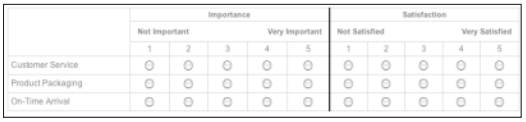

Figure 2-1: A side by side matrix table helps respondents respond to two different aspects of a question.

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Chapter 3

Using the QuestionPro Web Site to Create Surveys

In This Chapter

- Looking at the basics
- Adding questions
- Examining advanced options

This chapter is your A-to-Z guide to understanding how online surveys work and how to use QuestionPro software to get the answers you need for your organization. Indeed, this chapter helps you unleash the power of online survey software. It will take you step by step through the process of using QuestionPro tools to discover new insights about your customers and how they view your products and services. We suspect that by the time you're done reading this chapter, you will have confidence in your abilities to use this practical software to get results — and to reach others, too.

Understanding Basic Survey Operations

In a nutshell, those basic functions are: add, edit, copy, and delete. If you can master these simple commands, you're well on your way to executing response-generating surveys in QuestionPro. And don't worry, QuestionPro really is user friendly.

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Add or create a new survey

Are you ready to get your hands dirty with survey creation? To create a survey or add a question to an existing survey, follow these simple steps:

1. **Click on My Surveys.** The very first tab is called My Surveys. Click on that tab and you will see a link that says Create New Survey – click here to begin.
2. **New/Copy/Import.** Decide whether you want to create a new survey, copy an existing survey template from the QuestionPro library, or import a survey from a Word document. For a new survey, start from scratch by clicking on New Survey.
3. **Enter survey name.** Enter a descriptive name for the new survey in the text field. Be sure to enter a name that is logical and easy to remember. Also, if you'd like to place the survey in a folder, choose a folder you've created from the dropdown, and click next.
4. **Choose the template.** Choose your template and click next (or finish to skip).
5. **Choose the short URL.** You have the option to set the short URL for the survey. For example, you can set your survey to `joespizza.questionpro.com` for a more professional look. Click finish when you are done (or if you want to skip this step).
6. **Add questions.** You've now created your survey. Check out the "Adding a New Question" section later in this chapter for tips on how to add questions.

Edit your survey

Perhaps you made a mistake you need to correct: a typo, a badly phrased question, or something of the like. Don't panic. You can edit your survey before you send it. You'll see a list of surveys that you've created. All you have to do is click the Edit link that corresponds to the survey you want to edit and away you go.

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Copy or delete your survey

If you want to copy your survey to use as a template for a similar survey to a different audience, QuestionPro has you covered. When you log in, you will see the list of the surveys you've created. Toward the right-hand side are several links: Copy, Edit, and Delete. If you want to copy the survey, click on the Copy icon and voilá: An identical copy of the original survey with all the questions and formatting will be created for you.

If you want to delete your survey, click the Delete icon and it will disappear from your survey list when you refresh your browser.

Adding a New Question

What's a survey without questions? Well, it's no survey at all. Your well-ordered, well-developed questions make up the survey that gives you insights into customer or potential customer perspectives. Now that you understand the various types of questions and when to use them, it's time to get your hands dirty with the QuestionPro software. Follow these instructions to add new questions to your survey:

1. **Find the Edit Survey tab and click on the Add New Question link.** This will take you to the Question Wizard.
2. **Select question type.** From the Question Wizard, you see a dropdown menu that offers options for the various types of questions you could ask. Select the question type of your choice and click the Add Question button.
3. **Select question attributes.** The first screen lets you set up different attributes for the question. You can choose display options, answer options, special instructions, code, question numbering, and question text.

   Specifically, you can mark the Question as Required (Force a Response) and also Randomize the Answer options.

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Check boxes versus radio buttons

Unclear on the differences between check boxes and radio buttons? It's easy enough to get them confused if you've never heard the lingo, but once you catch on you'll never forget it.

- **Check boxes:** Also known as multi-select-based questions, check-box questions let users choose more than one option for the same question. You'd want to use this question type to let people "select any that apply." If more than one answer choice is allowed, then the browser will display check boxes.
- **Radio buttons:** This is a single-select question. These use radio buttons to allow respondents to choose one — and only one — option for any given question. So you may have ten options, but you want the respondent to make a decision on one.

If you want a radio button instead of check boxes in your multiple-choice question, you have to be purposeful about it. Here's how you do it: In the choice to "Select K of N" make sure that K > 1. Radio buttons are displayed for single-answer questions only.

If you absolutely must have an answer to your question, you can set up QuestionPro to *force a response*. That means the respondent is required to answer your thought-provoking question before he can move on to the next question.

Want to mix things up and remove any bias in your survey? QuestionPro lets you keep it fresh by randomizing the answer order. Simply check the Randomize Choices box, and your answer options will randomly be displayed to your respondent.

If you have special instructions for the respondent, you can enter your text in this step. These special instructions will be displayed on the survey before the Question Text.

Add the
HTML tag after your special instructions so spacing appears between the instructions and the beginning of the survey questions.

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Question Codes are provided for your internal reference. These codes can be useful for identifying questions (especially when exporting data).

4. **Set up question and answer options.** The next screen lets you set up question and answer options. This is where you enter the question in the text box. You can use the formatting links provided to apply HTML formatting to the question text. This is also where you enter the answer options — one per line.

As you set up your question and answer options, you need to press the Enter/Return button on your keyboard to indicate the end of one answer option and the beginning of a new one.

If you want to let your respondents choose other as a response to your question, then check the Other option box. You can also enter your custom text for this option. Last but not least, you can set up the font type, font size, and the width for the Question/Answer text. For proper formatting of the Questions/Answers, you should select Uniform Width throughout the survey.

5. **Preview your survey.** Click on the Preview button to move to the next screen. You're almost done. All you have to do is select the look and feel. You can choose between alternating color options — whatever strikes your fancy.

Did you get a last-minute inspiration? Having second thoughts about a particular question or its answer options? Never fear, the Previous Step button is here. You can click the Previous Step button to make any changes to your questions before the survey goes live.

6. **Save and add a new question.** If you thought you were finished but you just remembered you forgot a critical question, then you can simply click the Save & Add New button and add as many more questions as you want. When you're completely satisfied that you have asked everything you might possibly want to know in this particular survey, click the Finish button to seal the deal and close the window.

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Reordering Questions

There may come a time when you create a survey today and decide tomorrow, right on the brink of launch, that you really need to change the order of the questions to get the best possible responses. Maybe you were in danger of biasing the survey with your order. Or maybe you just decided on a more logical question hierarchy. No matter the reason, QuestionPro makes it easy. Here's how to reorder questions:

1. **Click on Edit Survey.**
2. **Click the Global Preferences link.** Find it on the lower-left page.
3. **Select a question.** Select one question from the menu. Move it up or down by clicking on the up/down buttons to change its position on the list.
4. **Reorder questions.** Click the Reorder Questions button to move your questions up or down within the survey.

Single Question Display Mode

If you get tired of adding page breaks, you might choose Single Question Display Mode. This mode allows you to only display one question on each page. In practice, this is the equivalent to setting a page break after each question. Here's how to set single question display mode:

1. **Click Edit Survey.**
2. **Randomize options.** Under the Survey Modes tab in the left-hand navigation, click the Randomize Options link.
3. **Choose the mode.** Click Single Question Display Mode.
4. **Save your changes.** Choose Save Change and you're all set.

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When Simple Surveys Won't Do

Most of the time all you need is a simple survey. But when simple surveys won't do, QuestionPro has you covered with more advanced features that bat your surveys into the big league. You may choose to randomize the order of the questions in your survey. Or you might even choose to launch a multi-lingual survey to get the opinions of customers or potential customers in various nations. This is, after all, a global economy. It's easy to add a touch of sophistication to your surveys with QuestionPro.

Randomizing the order of questions in a survey

Randomizing the order of questions in a survey can be a strategic decision. QuestionPro makes randomizing the order of questions in your survey as easy as a few clicks with your mouse and a few strokes on your keyboard. Keep in mind that in a branched survey this only affects the questions in a particular branch. Here's how to tap into the power of this option:

1. **Edit survey.** Click the Edit Survey link for the appropriate survey.
2. **Change the mode.** Under Survey Modes click on the Randomization Options link.
3. **Randomize questions.** Check the Randomize All Questions option in the Randomization section.
4. **Save changes.** Be sure to click the Save Changes button after you're done.

Making multilingual surveys

Whether your respondents speak English, Spanish, French, German, Chinese, Japanese, or some other language, QuestionPro offers you the ability to reach them in their own tongue. Here's how to create and execute a multilingual survey:

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1. **Create the survey.** Create the survey as you normally would in the language you're comfortable with.
2. **Make copies.** Now, make copies of the survey for all other languages you need to ask your questions in.

   QuestionPro does not translate your questions and answers for you; you have to make sure you have the proper translation.
3. **Set the language.** Under the Edit Survey screen, click on multi-lingual options. Set the language for each survey from the dropdown.
4. **Edit the text.** Edit or type the text for the survey questions and answers for each language.
5. **Create a qualifier.** Now create a new survey (for instance, "qualifier survey") to prompt the users to choose the language they would like to take the survey in.
6. **Use survey chaining.** Use the Survey Chaining option to branch to the correct survey language for each of the options in the qualifier survey. For more information, search for "survey chaining" in the help section.

When you use create and send multilingual surveys, you can do your data analysis or aggregate analysis quite easily. Just combine the frequency distributions in Excel or use the Combined Reports functionality. For more information, search for "combine reports" in the help section.

Deleting Test Data

There comes a time in every survey's evolution when you need to delete the test data you collected during pretest trials. If you forget to clear out all the test data from the database before starting to collect "real" data, then your results will be skewed. So tie a string around your finger or put an alert in that smartphone you carry everywhere. And before you go live with your survey, use the Clear Data function to delete the data. You'll find that function under the Data Management subsection of the Reports area of My Surveys. You don't need to fret too much though, because the system will also ask you each time you send out your survey with the e-mail tool.

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The Template Library

QuestionPro offers survey templates to help you get started building your survey. If you're familiar with templates for Microsoft Word or for Web sites, then you will feel right at home here. You can find templates based on publicly available information and best practices that can save you a lot of time in this handy-dandy online library. To use them, simply choose Copy a Survey Template when creating a new survey. From there, you'll be able to choose from over 400 templates.

My Question Library

Wouldn't it be nice if you could refer to a library chock-full of survey questions that had a guarantee of being answered? Well, no one has come up with that feature yet, but QuestionPro does offer a Question Library that makes things much easier for people who plan to continue using online surveys as part of their research. The Question Library lets you create a library of questions that you can reuse again and again. Some questions can inevitably be reused in other surveys in different formats and locations. The Question Library saves you time by letting you save those questions for future use.

When you are editing your survey, click Library in the group of buttons next to the question you want to add. This will add the question to your library.

When it comes time to tap into your treasure trove of questions, it's easy to pull from the Question Library to add questions to a new survey. Here's the process:

1. **Choose your survey.** Choose the survey you are currently developing from the list of your available surveys.
2. **Add new question.** Under Edit mode, click on the Add New Question link.
3. **Select Add Question.** Select the Add Question from another Survey/Library option from the Question Type drop down menu. You'll now see a Select Survey menu.

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4. **Select Question Library.** From the Select Survey menu, select the My Question Library option to add questions from the library to your new survey. You can also directly add the questions from another survey by selecting the appropriate survey.
5. **Choose your question.** Choose the question you would like to pull from the Question Library and click the Add This Question button. You can select multiple questions using the Control (Ctr1) key to add several at once.

If you want to edit the questions you've stowed away in the Question Library, feel free. All you have to do is click on My Question Library in My Surveys and make all the changes you want.

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Chapter 4

Tracking Respondents

In This Chapter

- Tracking individual responses
- Collecting anonymous responses
- Publishing surveys as links
- Publishing surveys as pop-ups

Before you send your survey to the masses, you've got a few more decisions to make. Do you want to track your respondents back to their e-mail address for the possibility of future marketing opportunities? Or would you rather allow your respondents complete anonymity? QuestionPro gives you the choice.

You also need to decide whether you want to publish your survey with a link, publish your survey as a pop-up, or just send it through an e-mail invitation. Your decision on how to publish your survey will depend, in part, on whether you want to track your respondents or let them keep the brown bag of anonymity over their heads.

The exception is pop-ups. Regardless of whether you want to track respondents or not, you can choose to insert JavaScript code on your Web site that will generate a pop-up invitation for site visitors to take your survey. You may have seen these invitations. Many use the pop-up opportunity to offer visitors an incentive for taking the survey — like entering into a drawing to win something they value — and may evenattempt to overcome objections by assuring users a survey will only take ten minutes.

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In this chapter, you get a quick and dirty overview of how to set up your survey to track respondents, leave them anonymous, publish your survey as a link, or use pop-ups. As you get more familiar with the world of online surveys, you may discover that different approaches work better for different surveys, and you can develop a list of internal best practices based on experiences with your target respondents. (For more information on best practices, read Chapter 9.)

Keeping Track of Individual Respondents

When it comes to tracking your survey respondents, you have two options: You can track individual responses and correlate them back to the respondent's e-mail address, or you can collect anonymous responses. Your decision should be based on whether or not you need to track your respondents' every move. If you want to publish a link on your Web site or print a generic link on a postcard that you'll mail to your respondents, then collecting anonymous responses is fine and good. Of course, keep in mind that if you choose anonymous tracking, you won't be able to send out *e-mail reminders*. An e-mail reminder is a resend of your survey invitation to people who haven't completed the survey.

Respondent Tracking 101

If you decide to link individual responses to e-mail addresses, you have to send out what's called a *Respondent Tracking URL* — a URL in your e-mail survey invitation that allows you to track the activities of your respondents. If you don't want to co-relate e-mail addresses with the individual responses, on the other hand, then use the *Anonymous Survey URL* — a URL in your e-mail invitation that allows the respondents to remain anonymous — instead. You have to choose to include one or the other URL.

Again, if you want to use send-out reminders, you have no choice but to use the Respondent Tracking URL. That's because the system will automatically generate a unique survey URL for each respondent's e-mail address. Also keep in

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mind that if you want to delete e-mail addresses from a particular group or if you want to delete an entire e-mail group after you've distributed the survey e-mail invitation, respondent tracking data will subsequently be lost.

Publish Your Survey with a Link

Say you just want to place a link to your survey on your Web site or send a link to a few friends. Just go the Send Surveys section of QuestionPro, click on Survey Web address in the left-hand column. Here you'll have access to the *anonymous* portion of the survey link (no tracking).

You can also do some fancy stuff with the URL to your survey. Let's say you want to mail out a postcard to get people to take "Bob's mini-golf" survey. You'll need a "short URL" that is much easier for your respondents to type in. Enter QuestionPro with its fabulous custom URL feature to the rescue! Click on Customize in the Custom Survey Link/URL section. Here you can type your new name, such as "bobsminigolfsurvey.questionpro.com." Now your respondents just type in this URL, and they're on their way to mini-golf feedback heaven.

Publish Your Survey as a Pop-Up

Ever seen those pop-up survey invites while you're browsing the Web? Pop-ups can be an effective way to get the attention of folks browsing your site. That's why QuestionPro provides you with *JavaScript code* — a scripting language most often used for client-side Web development — which you can use to set up pop-up surveys on your site. You can access the pop-up survey options under the Send Survey tab. Just choose Send Survey, and then select Pop-up Surveys in the left-hand navigation. This will offer up the code that you need to place into your Web site.

Even if the potential respondent has a pop-up blocker, QuestionPro's pop-up tool will get around it.

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Chapter 5

Sending Your Survey to the Masses

In This Chapter

- Creating your invitation
- Uploading e-mail addresses
- Sending out respondent reminders
- Understanding spam laws
- Looking at custom variables

This is the moment you've been waiting for. You're confident in the power of online surveys to drum up the information you need to make decisions about your products and services. You've created your QuestionPro account. You've developed your questions and entered them into the system. Now, it's finally time to send your survey to the masses so you can start gaining the insight you hoped for when you discovered online surveys in the first place.

You start by creating a *survey invitation* (the e-mail you send to your respondents to ask them to complete your survey). After all, you've worked too hard to leave it to chance that someone will stumble across your survey during a visit to your Web site. You need to invite them to take your survey — and you do that with an e-mail. A few technical matters must be attended to at this stage in the online survey game (read: uploading the e-mail addresses) but QuestionPro makes all these things painless.

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Because QuestionPro wants you to avoid spam complaints as much as you do, the software helps you navigate through that potential problem with easy steps to ensure you remain compliant with the laws of the land. You also need to take care of some clean up issues after the survey, like a heart-felt thank you, that the software can help you address in a jiffy.

In this chapter, I show you how to create your invitation, upload your e-mail addresses, send out respondent reminders, and offer some pointers on spam laws and compliance options to make sure your innocent online survey doesn't get heaped in with the letters from Nigeria promising to share the prince's inheritance. I also discuss advanced tracking features available with custom variables.

Creating the Survey E-mail Invitation

Are you ready to create your survey e-mail invitation? Don't worry. You don't have to do anything so fancy as those expensive wedding invitations you've no doubt received in your day. You don't need any special design skills, or any special skills at all, really. QuestionPro does the heavy lifting for you. Here's how to create the invitation that will get your survey into the hands of people who can give you the answers you need:

1. **Access the invite.** Under the Send Survey tab, click on the Send Email Invitation button/link in the left navigation to access the Email Invite.

   Be sure to select the right survey! If you have created several surveys with similar names, it's easy enough to choose the wrong one. So go ahead and double check. The active survey name is displayed in the right corner.

2. **Edit the invitation.** Click the Edit Email Invitation link. This is the area that lets you set up the text for the e-mail invitation. You can either enter plain text or you can use HTML formatting for the e-mail invitation. This section also allows you to specify or change the From

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Email address, From Name, and Subject for the survey e-mails. You may discover that some subject lines are more successful at getting people to open the survey than others.

QuestionPro requires you to include the survey link in the Edit Email Invitation section. You can include the survey link you want to include from the Insert Survey Link drop menu.

3. **Save your changes.** You can click the Preview button to preview your invitation or you can exit this area without saving. If you're happy with what you see in the preview mode, be sure to click the Save button so you don't have to repeat your work.

If you want to test the survey invitation before you send it to the masses, QuestionPro paves the way. Just enter in your own e-mail address and off you go. Be sure to remember to clear out the data from the survey when you're ready to send out the survey to your real respondents so you don't skew your data.

Uploading Your E-mail Addresses

You've probably built a substantial e-mail mailing list in your day, or perhaps you've purchased an e-mail mailing list from a reputable organization. Either way, you've got to upload those e-mail addresses before you can finally launch your survey through QuestionPro. This quick task takes you one step closer to getting the results you need. Here's how to upload your e-mail addresses:

1. **Go to My Surveys.** Click the My Surveys tab within QuestionPro to see your list of surveys.
2. **Manage your lists.** On the Send Survey tab, click on Manage Lists. You'll see this on the left hand navigation.
3. **Create or edit.** From here you have two options. You can either create a new e-mail list or click on the

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Edit link to upload e-mail addresses in an existing e-mail list.

Always upload e-mail addresses one per line.

4. **Create a new list.** Under the Send Surveys tab, click Email Lists and then Manage Lists. In this mode, you can click on the Edit link for a pre-existing e-mail list or click Create New E-mail List.

You can make your e-mail list available to all your surveys, or only to a specific survey. Just click on Advanced Options and choose from the Type drop down menu. Then choose either Survey Specific List or Global List to suit your needs.

5. **Upload your addresses.** Click the Bulk Upload link to upload the e-mail addresses. A pop-up window asks you to browse for the correct path for the file on your hard drive. After you find the file, click the Upload button.

Remind Your Respondents to Respond!

It's a busy world and even the people with the best intentions of responding may readily forget in the face of deadlines, family pressure and, well, you get the picture. Sometimes a friendly reminder in the form of another e-mail offers that gentle nudge someone needs to complete your survey.

If you chose to enable respondent tracking when you were setting up the invitation, you can send *e-mail reminders* (a resend of your survey invitation) to the folks on your e-mail list who haven't yet responded. After all, maybe they were on vacation and need a little computer-based warm up before diving back into the world of work.

If you decide to send out a reminder a few days later, there are two delivery modes from which to choose: Normal - Survey Invitation and Reminder — Resend To Non-Respondents. The

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first option sends out the email to every address in your e-mail list so be sure not to hit the wrong button or you could annoy your respondents. (For more information on respondent tracking, check out Chapter 4.) Here's how to send reminders:

1. **Click on the Manage Lists link under the Send Survey tab.**
2. **Select an e-mail list.** Choose the e-mail list to which you have already sent the survey and click on the Report link.
3. **Send your reminder.** Click on the Send Reminder link for the e-mail batch to which you want to send the reminders. The reminders will be sent only to the e-mail addresses for the respondents who have not yet completed the survey.

Avoiding Spam Complaints

Forgetting to say thank you is one thing. Being considered *spam*, or unsolicited e-mail, is quite another. The first instance can get you classified as rude. The second can get you classified as illegal. Don't worry, though, QuestionPro has taken measured steps to make sure you don't wind up on the *blacklist* — a list of e-mail addresses that are blocked from sending e-mail — of an Internet Service Provider. By following QuestionPro's methods, you can keep people from complaining that you're sending them spam when all you're trying to do is get their opinion.

Unless you've been living under a rock since the early 1990s, you know all too well what spam is. And you know you don't want to be classified with the pornography peddlers, identity thieves, and Viagra pushers that are running rampant on the Internet. If you mishandle your e-mail list, it can cause headaches for your organization and even for QuestionPro's staff. If that's not enough to encourage you to distribute your online surveys with care, consider this: improper handling of an e-mail list can cause a drop in your survey response rates as well as a dip in your study's credibility.

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Understanding the spam laws

Have you ever head of the CAN-SPAM Act of 2003? CAN-SPAM stands for Controlling the Assault of Non-Solicited Pornography and Marketing Act. The law established requirements for organizations that send commercial e-mail. The law also spells out penalties for spammers — and companies whose products are advertised in spam — if they violate the law. Finally, the law gives consumers the right to ask e-mailers to stop spamming them.

Here's what you need to know: If you send out e-mail for the primary purpose of advertising or promoting a commercial product or service, including content on a Web site, then you are liable to the CAN-SPAM Act. You're exempt from most provisions of the CAN-SPAM Act, on the other hand, if you are sending a "transactional or relationship message" e-mail that facilitates an agreed-upon transaction or updates a customer in an existing business relationship so long as it does not contain false or misleading routing information.

Reviewing compliance options

The bottom line: You don't want to violate this law. Reviewing compliance options in QuestionPro software keeps you on the safe side of e-mail surveys. Here are some easy-to-understand pointers that will spam-proof your survey invitation:

- **Be sure that the "From" and "To" routing information in your e-mail is correct.** This includes the originating domain name and e-mail address (for example, `johndoe@company.com`) is accurate and identifies the person who is sending the e-mail.
- **Be sure your subject line is not misleading. Make sure** you don't mislead the recipient about the contents or subject matter of the message. For example, don't put "Win a prize" in the subject of your e-mail, and then include a link to your survey.
- **Be sure to give your recipients an opt-out method.** The law demands that you provide a return e-mail address or

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some other Internet-based response mechanism that allows a recipient to *opt-out* (ask you not to send future e-mail messages to that e-mail address). You must honor that request.

Some requirements of the CAN-SPAM Act are in your hands. It's up to you to ensure that you aren't confusing people about the intent of the invitation or making untrue promises. When you enable QuestionPro's CAN-SPAM Compliance Tool, however, you're covered in two key areas of the law. All e-mails you send out via QuestionPro's system will automatically offer an unsubscribe link and a postal mailing address. It's simple to enable the CAN-SPAM Compliance tool. Just click My Account and then CAN-SPAM Compliance and fill in the required information.

- **Be sure your commercial e-mail is identified as an advertisement and include the sender's valid physical postal address.** In practice, that means your message needs to contain clear and conspicuous notice that it is an advertisement or solicitation — and that the recipient can opt out of receiving more e-mail from you. It also means you need to include your mailing address.

After You Send the Survey...

After you send the survey, you may feel like a kid on Christmas Eve, anxiously awaiting the opportunity to see what's inside the box. QuestionPro figured you'd want an up-to-the-minute heads up on the survey completions, as well as a way to thank respondents for their valuable time after they checked off the last answer. That's why QuestionPro developed a quick and easy means to do both tasks in its browser-based software.

Sign up for e-mail notifications

If you want to know each and every time someone completes the survey you toiled over, and then enable Automatic Email Notification for your survey. That way, when respondents

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complete the survey, you receive an e-mail with the completed response attached. You can have the e-mails sent to the survey administrator's e-mail address or if you have multi-user accounts, then the e-mails can be sent to all users for the organization at the same time. Here's how to do it:

1. **Click the Edit Survey tab in the QuestionPro software.**
2. **Under Survey Control, click Email Notification.**
3. **Set notifications.** Under Automatic Confirmation/Archive, enable automatic e-mail notification. You can choose who to send the e-mail to.
4. **Save changes.** Be sure to save your changes when you're done by clicking the Save button.

For information on what the Spotlight Report is and how to use it, turn to Chapter 6.

Don't forget to say thanks

Don't you hate it when people don't say "thanks" after you've done a good deed? Don't repeat that etiquette no-no. When respondents take the time to complete your survey, be sure to thank them for offering up their valuable feedback. QuestionPro makes it easy. You can set up your survey to automatically send out e-mails thanking your faithful respondents. Here's how:

1. **Click the Edit Survey tab in the QuestionPro software.**
2. **Under Survey Control, click Email Notification.**
3. **Set notifications.** Under Automatic Thank You Email/Spotlight Report, enable the automatic thank you.
4. **Save changes.** Be sure to save your changes when you're done by clicking the Save button.

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Advanced Tracking with Custom Variables

In addition to tracking respondents' e-mail addresses, you can also associate custom variables that can be used for creating personal e-mail invitations, segmenting data, and corresponding data back to your database.

Custom variables are used to store additional information that is passed to the survey and ultimately stored with the respondent's response.

You'll see the option to use these custom variables throughout QuestionPro such as with the response viewer, Excel and CSV exports, trend analysis, Grouping, and so on. For example if you upload Department as a custom variable, you can set up Groups for each department and run analysis separately for each department.

There are a few simple rules to follow when using Custom Variables:

- Each Custom Variable can store up to 128 characters.
- You can't use a Comma (,) or the Pound/Hash (#) sign in the Custom Variables.
- Accented characters or characters from languages other than English may not be saved.
- Each custom variable has a name and then a value assigned to it.
- The names can't be changed, and are always "custom1," "custom2," and so on.

Uploading custom variables

When using the QuestionPro e-mail management tool, you can upload custom variables with each respondent's e-mail

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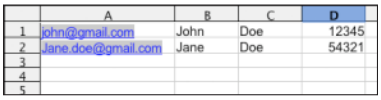
address in a comma separated list either by uploading a file or by pasting these values into a list.

The easiest way to load custom variables is to create a spreadsheet file with the first column containing an e-mail address. Each subsequent column includes the values you want to load into each custom variable. Simply save the spreadsheet as a CSV file and then upload the list.

Say you have a set of customer e-mail addresses in an Excel spreadsheet listing their first and last names and a customer number. In the example shown in Figure 5-1 the variable 'custom1' would be set to first name, 'custom2' last name, and 'custom3' would be customer number.



	A	B	C	D
1	john@gmail.com	John	Doe	12345
2	Jane.doe@gmail.com	Jane	Doe	54321
3				
4				
5				

Figure 5-1: Setting custom variables.

If you're not using the QuestionPro Email Management tool for distribution (for example, if you want to use an Outlook Mail Merge), then you can pass in Custom Variables along with the Survey URL. Following is the format for passing in the Custom Variables (XXXXXX is the unique ID for the Survey): `http://www.QuestionPro.com/akira/TakeSurvey?id=XXXXXX&custom1=John&custom2=Doe&custom3=12345`

Displaying custom variables

You can display custom variables anywhere on your survey y. For instance, if you included your customer's name as a variable, you could address your respondent by his first name in a question. The trick is to use a tag that tells QuestionPro to replace that tag with the value in a custom variable. Tags are always marked by the $ sign and curly braces. So when formatting your question about favorite sodas, you'd write the following text:

${custom1}, what is your favorite soda?

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When John Doe takes the survey, he sees his name displayed on the question, for that personal touch. See Figure 5-2.

Figure 5-2: Custom variable can help you personalize your survey.

You can do so many powerful things with custom variables to make your surveys shine. For more tips and examples, search for custom variables in the help portal.

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Part II

Analyzing Your Survey Results

"Right here..., crimeorg.com. It says the well run small criminal concern should have no more than nine goons, six henchmen and four stooges. Right now, I think we're goon heavy."

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In this part . . .

One of the most important aspects of any survey is analyzing all the data you receive from your responses. In Chapter 6, you find out how to deal with the different types of reports QuestionPro offers before heading on to Chapter 7, where you begin to analyze the results.

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Chapter 6

Dealing With Different Report Types

In This Chapter

- Looking at real-time data reports
- Understanding the spotlight report

Numbers don't lie, but unless you understand how to read the reports that display the numbers, you could end up basing your next marketing campaign on erroneous information. QuestionPro helps you make the most of your data with easy-to-read reports that get to the bottom line in a hurry.

Whether you're the type that can't wait until the final whistle blows to start peeking at the responses, or you like to see the data from a dozen different angles, QuestionPro lets you decide how to digest the data. You can group your respondents into any number of different categories. You can even put a spotlight on certain respondent's answers and share them with key stakeholders in the organization to prove a point.

Analyzing data can give you distinct clues into the survey-building process. If your respondents repeatedly failed to answer a certain question, it's possible that it wasn't clear. If most of the people you sent the survey to got halfway through and quit, it could be possible that your survey put them to sleep because it was too long, too wordy, or too something else. So your statistics give you insight into not only how your

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respondents feel about issues, products, or services, but also how they feel about the way you asked.

In this chapter, we show you how to dissect real-time data reports. We also discuss how to use QuestionPro's filters, put a spotlight on respondents, review participant stats, and access your open-ended question responses. We've even defined some of the most common stats, so you have a running start on your analysis.

Dissecting Real-Time Reports

Our society is hooked on real-time data. You can get real-time NBA scores on the Internet, real-time headlines on your cell phone, and real-time reports on your online survey software if you use QuestionPro. QuestionPro hooks you up with what's called the *real-time summary report.* It provides basic statistical analysis on your survey questions. The data is actually collated in real time as the respondents are completing your survey. All you have to do is click on the Reports tab and choose Real Time Summary Report.

Reviewing respondent reports and participant stats

Whether or not you like stats, you'll appreciate all the options QuestionPro offers to help you make the most of your online surveys. Beyond the answers themselves — like how many people prefer your brand of peanut butter — you need to keep tabs on how many people are actually taking your survey, how many only make it halfway through, how many never open the e-mail, and other telling statistics.

You can find these stats under the Reports tab in the QuestionPro software (Click Participant Statistics in the left-hand navigation bar).

One thing is certain: If you don't know what the various stats mean, you probably won't rank as most improved. Some of

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the stats are obvious, others aren't. Here are some quick definitions to get you on the fast track to survey optimization.

- **Viewed:** The total number of users who click on the link to access the survey. Every time your survey is requested, the view count is incremented and updated. The respondent doesn't necessarily have to start the survey in order for the click to be counted as a view.
- **Started:** The total number of respondents that have started the survey. A response is recorded as Started if the respondent clicks the Continue button on the first page.
- **Completed:** The completed count is all respondents that have gone through the entire survey and clicked on the Finish button on the last page of the survey.
- **Completion rate:** This is equal to the number of Completed survey responses divided by the number of Started survey responses.
- **Drop outs:** The number of respondents who start the survey but don't complete it.
- **Terminated via branching:** If you have set up branching in your questions to terminate the survey for specific criteria, then the number of terminated respondents will be displayed in this column. ***Note:*** This column will only be displayed if you have set up branching to termination.

Analyzing open-ended answers

If you included *open-ended questions* (questions that seek to explore the qualitative, in-depth aspects of a particular topic or issue) in your survey, then you obviously need to review the text responses manually and take them into consideration based on general trends you find in the responses. Just click on the Reports tab. Under the Reports section in the left navigation bar, click Open-Ended Text. You'll find a list of each open-ended text question and response for your reading enjoyment.

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Analyzing one response at a time

If you want to analyze individual responses, QuestionPro makes this possible with the Response Viewer. You can use the Response Viewer to view, edit, or delete individual responses. You could choose, for example, to view the responses only of those who completed the survey. You could also choose to view the responses of surveys that were started but never finished. If you've created groups, you can use the Response Viewer to view the individual responses for the respondents from that group.

If you want to use the Response Viewer, follow these steps:

1. **Open reports.** Click on the Reports tab.
2. **View responses.** Under the Data Management section in the left navigation bar, click Response Viewer.
3. **Select your criteria.** In this area, you can filter your response data by Group, Response ID, and Survey Result. After you select the desired criteria, click the Search Database button.
4. **Choose your response.** Click on an individual response ID to view, edit, or delete the response.

Shining a Light on the Spotlight Report

Everyone likes to be under the spotlight (well, almost everyone). The *Spotlight Report* lets you share the survey results with each respondent so they can see how their answers compared to the rest of the respondents. Here's how it works. After users complete the survey, they're directed to a public version of the Real-Time Summary report. The respondent's answers are marked with a star so they can quickly see how they compare.

It's easy to put your respondents in the spotlight, so to speak. Follow these quick steps:

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1. **Edit survey.** Click the Edit Survey tab and you'll see a heading called Survey Control in the left hand navigation bar.
2. **Go to Finish Options.** Under the Survey Control heading, click on Finish Options.
3. **Select Spotlight Report.** Now select Spotlight Report from the drop down menu and save your changes.

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Chapter 7

Digging In to Advanced Survey Analytics

In This Chapter

- Betting on banner tables
- Sharing your reports with colleagues
- Digging out survey trends
- Exporting your raw data

If a simple analysis doesn't satiate your desire for survey data, QuestionPro offers more advanced tools that slice your responses in colorful ways. In fact, these tools can save you hours of time you might otherwise spend number crunching. They can also offer insights that you might not otherwise have thought to dig out. Taking advantage of these tools can make even the simplest data profound by offering comparisons that tell a deeper story about your respondent's opinions.

As you discover how to dig deeper into your data, always keep actionable results top of mind. Some statistics may be quite interesting, but that doesn't mean they will necessarily translate into a tangible action item. It could be something you need to keep your eye on, but not necessarily something you can wrap your arms around this quarter. The value of online surveys is that they provide information on which you can base decisions about employees, products, services, and other issues your organization is facing — right now.

In this chapter, we show you how to leverage the power of banner tables, how to group and segment your data at new

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levels, how to dig out all-important survey trends that can identify data points you never considered, how to export your raw data, and how to share your reports with your colleagues and others.

Betting on Banner Tables

Everybody likes pretty pictures. QuestionPro offers banner tables to satisfy your taste for visual data that has real meaning. Banner tables give you a picture of the data that corresponds to individual survey questions. Pretend your survey asks respondents, "Where are you from?" and the answer options are "East Coast," "West Coast," and "Midwest." You can use the banner table option to generate a visual representation that shows you how respondents from each region answered the other questions in your survey. This way you can identify regional trends, if they exist, without having to create groups and segments for each option.

The question you use to segment the rest of the survey is called the *Pivot Question,* and it could be based on any number of criteria. In addition to location, you could segment by age, income, or other demographic.

Creating a banner table report offers a great return on your time investment. With just a few clicks, you can save yourself hours and hours of work. Here's how to create a banner table report:

1. **Enter the Reports section.** Click the Reports tab.
2. **Cross tabulate.** Under the Online Tools heading in the left navigation bar, click Cross-Tabulation.
3. **Choose pivot question.** In the Banner/Pivot Tables box, choose your pivot question from the drop-down box.

You can choose a custom variable also. If you decide to create a custom variable, QuestionPro software will produce a banner table for each distinct item for that custom variable. For example, if you are capturing "sales region" as one of the custom variables, choosing that custom variable will automatically segment your data based on every distinct region in your dataset. For more on this, see Chapter 5.

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4. **Choose output options.** Choose among the various output options.
5. **Click Create Banner Table.** As soon as you click the Create Banner Table option, your report is placed into the job queue. Pretty soon, you'll receive an e-mail from QuestionPro with the completed report attached. You can also click refresh after a few minutes and access a link to the report that way.

Sharing Your Reports with Colleagues

After you get the survey results and all the customer revelations about your products and services that come with them, one of two things will happen. You'll be so excited at the opportunities the survey represents, or you'll be disappointed that your organization hasn't lived up to its reputable brand name. Either way, you'll be eager to share the results of your reports with colleagues so the decision makers can do what they do best: make decisions on how to respond to the results.

QuestionPro lets you share your reports with colleagues via e-mail or through report sharing links. You can share them with everyone, or you can provide a password that allows a select few to view the reports. Here's how:

1. **Open the reports area.** Click the Reports tab in your QuestionPro software.
2. **Find your online tools.** Under the Online Tools section in the left navigation, choose Report Sharing.
3. **Enable report sharing.** Click the check box labeled Enable Report Sharing.

   If you'd like to restrict the report to the people within your organization that are on a need-to-know basis, then type in a password in the Password field. You can share the password with the appropriate people within the organization.
4. **Save your changes.** Click the Save button to save your settings.

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You're all set. You can now distribute your Report Sharing links via e-mail or you can post the link on your Web site.

Filtering Reports with Groups

If you're looking for power tools, look no further than Grouping or Segmentation. This is one of the most powerful and underused features in QuestionPro's reporting tool set — and you're about to find out how to use it. A *group* is one or more filters on your dataset. A group can be a simple filter based on a response to a question like, "all male respondents" or complex like, "all female respondents, aged 18 to 25, who drink orange juice but hate vanilla ice cream." After you create a group, you can save it for later use in various reports throughout QuestionPro.

QuestionPro calls creating filters Grouping or Segmentation. Sometimes also called querying, this process is essentially all the same thing.

Types of grouping

Before we dive into the details of Grouping, it's important to get an overview of the different types of grouping that can be accomplished (you'll see these broken down into three sub tabs within the grouping tool as well):

- **Response-based filtering:** If you want to segment your respondents into groups based on their answers, *response-based filtering* does the job. If you have a question in your survey that asked if the respondent was male or female, you could create a group of all male respondents, for example.
- **Time-based filtering:** *Time-based filtering* is just what it sounds like: creating segments of data based on when the survey was completed. You could, for example, create a time-based group called "March" that includes all survey data from 3/1/2007 to 3/31/2007.
- **System variable-based filtering:** If you send out surveys on a regular basis, you could get bogged down in the details — unless you use *system variable-based filtering,* grouping surveys based on variables. QuestionPro offers

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built-in system variables that make it easy to group your surveys on almost any variable you can think of. If you've sent the same survey to different e-mail lists, for example, you can filter your results by only that specific list with the E-mail List Code filter. If you used an Employee ID, Project ID, or ZIP code, or some other ID descriptor in a custom variable, you can filter by this as well. For more information on creating custom variables, see Chapter 5.

Tapping into the power

Are you ready to tap into the power of Grouping and Segmenting? You don't even have to wear goggles or gloves to operate this power tool. Here's how to set up groups based on the response from a question:

1. **Click the Reports tab.** Look for a section called Advanced Analysis in the left navigation bar.
2. **Choose Grouping/Segmentation.** Under the Advanced Analysis section, click on Grouping/Segmentation.
3. **Choose a question.** Choose the question you want to Filter/Select.
4. **Choose an operator.** Choose one of the operators for the answer. (***Note:*** Most people choose =.)
5. **Choose the answer.** Choose the answer for the selection criteria. (***Note:*** You can also hold down the Ctrl key to select more than one.)
6. **Add Filter.** Click on Add Filter to filter the data according to the criteria you selected.
7. **Repeat.** Repeat steps 3 through 6 if you want to add more criteria to the filtering process.
8. **Save your results.** After you finish applying filters, give the group a name and click the Save Filter to Group button.

That's it. Now you can see your new group listed below. Next to it you see links to reports that you're already familiar with. Specifically, you can click on the Summary Report link to run your fancy new filter against this report. Also, you'll notice that these groups you've created will pop up in various places throughout QuestionPro such as when you're exporting data

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to Excel, running trend reports, or running the response viewer.

Digging Out Survey Trends

Did you wear bellbottoms in the 1970s? (Or the 2000s?) Whether or not you consider yourself a trendy dresser, you'll certainly want to be a trendy surveyor. In other words, you want to dig out the trends buried in the mountains of data QuestionPro software collects for you. Trends play an important role in your decision-making process — and so does monitoring how trends change over time. QuestionPro's downloadable Trend Report computes the analysis of your data over the long haul.

Imagine you're running the same survey multiple times a year, or even on a continual basis. You can view the data for different time segments side-by-side, such as January versus June. Here's how to generate the Trend Report:

1. **Click the Reports tab.** You'll see the Advanced Analysis heading in the left navigation.
2. **Click Trend Analysis.** Click the Trend Analysis option to access the data set filters.
3. **Choose an optional grouping.** Click the Data Set Filter link to choose an optional grouping (you'll see the groups you created above here).
4. **Choose a survey result.** Choose a survey result you would like to focus in on for the trend (optional).
5. **Enter the dates.** Enter the start and end dates into the box.
6. **Choose the frequency.** Select Weekly, Monthly, or Quarterly.
7. **Download your report.** Click the Download Trend Report button. The report is generated and e-mailed to you after it is complete. If you're anxious to receive the report, wait right where you are and refresh your browser. In moments, you'll see a link to download the report.

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QuestionPro can save any file you generate in the Download Center so you can go back anytime and download the same report again. In the Reports tab, under Data Management, click on Download Center to view all the files/reports you've generated.

What If I Need an Excel Spreadsheet?

Need to export your raw data out of QuestionPro and into another file format? Sometimes you need to have the data in another format, and it's always a good idea to have a back up. That's why QuestionPro lets you export the raw data from your survey to an external file format such as Comma Separated Values (CSV), SPSS, or Excel file.

Whether you need to export your raw data to a CSV file, an SPSS file, or an Excel file, you can generate the reports you want in the file format that suits you in three easy steps:

1. **Click the Reports tab.** Under the reports heading in the left hand navigation, you'll see a subhead called Export Data.
2. **Choose your flavor.** There are sections on this page dedicated to each type of file format to export to. Choose the appropriate options.
3. **Get your File.** Click the Download button to get your file.

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Part III
The Part of Tens

"Okay, so maybe the Internet wasn't the best place to advertise a product that helped computer illiterate people."

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In this part . . .

In the Part of Tens, you get the inside scoop on ten ways to boost your response rates and ten best practices for online surveys. Also included is an appendix that discusses various other offerings from QuestionPro.

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Chapter 8

Ten Ways to Boost Response Rates

In This Chapter

- Finding your perfect audience
- Keeping things simple
- Sharing your results

Have you ever sent out invitations to a wedding, birthday party, or some other event? You probably included four letters to compel a confirmation: RSVP. After you sent out those invitations, you eagerly waited for the RSVPs to roll in through telephone and mail with respondents acknowledging they are pleased to attend your special event.

It's much the same with online surveys. You send out an e-mail invitation that compels them to click a link that escorts them to your online survey (your special event). Then you anxiously await the responses. Of course, you had some inkling they would come before you sent out the invitation. Your e-mail list is made up of individuals who have some relationship with your organization, or have shown some interest in the types of goods and services your company offers. But even if you know them well, it's no guarantee they will come. (That may explain why Uncle Jason didn't show up to your cousin's wedding.)

If you take a strategic approach to targeting your survey and take measured steps to boost your response rates before you ever send out the invitation, you can't help but get more of those coveted RSVPs. In this chapter, we share ten time-tested techniques for boosting your response rates. As you continue

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using QuestionPro software to develop and send surveys, you're bound to come up with some techniques of your own. In the meantime, employ these tips and watch those RSVPs greet you with valuable responses to important questions.

Find Your Target Audience

You have to know who your target audience is in order to develop the appropriate questions. But even the most thoughtfully crafted queries won't do you much good if they don't get in front of your target audience. Most people automatically think of sending their online survey to their e-mail list, and that is a great place to start because the survey recipients will be familiar with your organization. But that's no place to end.

If you want to boost your response rates, then consider a variety of venues for posting your survey with the idea that more is merrier. Posting a link to your online survey on your Web site is a no-brainer for public surveys, of course. But you can take the Web site strategy a step further by posting on other people's Web sites. Try the site of online newsgroups or Web communities you belong to. Or try a strategic partner that stands to benefit from the survey results in some way.

Don't forget employees, friends, family, colleagues, and other survey takers. Ask for ideas about where to post the survey online and encourage your respondents to share the survey with others who may be interested in sharing their opinions. You can even offer an incentive for the survey respondent who gets the most people to participate.

Make It Personal

Let me ask you a question. Do you open snail mail addressed to "Valued Customer" or "The Person at 123 Main Street"? If you're like most people, 99 percent of this junk mail goes straight into the waste paper basket. The same is true in the electronic world. People are weary of junk mail, or spam, and their fingers are trigger happy when it comes to the delete button.

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If you want to avoid the electronic trash heap, try using a personal salutation. You can boost your response rates by at least 5 percent — sometimes even more — by addressing the e-mail recipient by first and or last name. Using their name gives the potential respondent a heads up that you know them, or you have at least crossed paths at some point along the Information Superhighway. So go ahead, send your e-mail to "Mrs. Johnson" instead of "Dear Valued Customer," so your e-mail looks legit.

Keep Your Invitation Short And Sweet

E-mail isn't meant for writing epics or even long letters. Just the opposite is true. E-mail is designed for quick and simple communication. So when it comes to sending out e-mail invitations, remember to keep it simple, surveyor. In this context, simple means short and easy to read. That said, you need to offer the recipient enough information to discern the intention of your survey and entice them to click through the link and complete your online questionnaire. It's a fine balance, but it's an essential one if you hope to boost your response rates.

Right off the bat, make it crystal clear who you are and the purpose of your study. Be up front about the survey's benefit to the individual and to your organization. (This may takesome thought, but "in order to improve our products/services" is as good a reason as any.) Adding a short privacy statement can also be reassuring.

As you continue getting right to the point, remember to tell your recipient how long the survey will take to complete. If it's short, that's great. Amplify that message. If it's long, you may want to downplay the length a bit, but whatever you do, don't lie about it. Don't tell folks your survey will take 10 minutes when you know good and well it will take 15 or more even for the fastest respondents. If you aren't truthful, you lose credibility and the respondent may not take your next survey. People are likely to complete longer surveys if they know up front they're long. If you set out to deceive, you could end up with a lot of half-completed surveys in your database.

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Keep Your Instructions Short

Did you actually sit down and read the instruction manual that came with your car? What about the one that came with your MP3 player? Your blender? Your hair dye? Okay, well, maybe you did read the instructions for the hair dye. But the point is that most people don't bother to read instructions. That doesn't mean you shouldn't offer any. But it does mean you should keep things simple. Studies have shown that most people don't read extensive instructions.

If you enticed your respondent to click through the e-mail invitation or click through a link on a Web site, then don't blow your chances now. After you've got a live survey taker on your hands, let them get right to it. That said, be sure that you do offer some simple instructions that are easy enough for a kid to understand. If there is anything unusual about your online survey — if you want them to complete it in a certain amount of time or if you need them to complete it in one sitting — then be sure to make that clear up front or you could skew your results. Remember, the idea is to boost your response rates, but you want accurate responses.

Communicate Your Privacy Protections

Privacy concerns are a biggie. They're so important in fact that a Carnegie Mellon Usable Privacy and Security Lab study found that people are more likely to buy from online merchants with good privacy policies. They were also willing to pay about 60 cents extra on a $15 purchase when buying from a site with a privacy policy they liked. Among the chief concerns listed in the study were fears that unscrupulous online merchants might misuse credit card information, target spam to their e-mail addresses, or violate their privacy in some other way

In other words, you need to share information about your privacy protections. The best place to share information about how you will be using people's responses is right on the first page of the survey. One of the key questions people want answered is "Where will this information be used?" If the responses will be anonymous, tell them in a hurry. Will the information be held confidential? Another plus.

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A sample privacy statement

Need some help developing a privacy statement? Here's a sample to get you started:

> Data collected through surveys is owned solely by ACME Company By default, the data is only accessible by providing a username and password and logging into the site. There is the option to share online reports via a URL from the administrative account. The survey administrator controls this option. We will never share any of the data collected with third parties. If a user specifically requests a service from one of our partnering companies, their personally identifying information will be shared. The partnering company may contact them directly regarding their inquiry. Any requests of partnering companies are initiated solely by the user and it will be clearly indicated that a partnering company offers the requested service.

Don't Forget to Send Reminder E-mails

It's inevitable, and quite welcome, that some of the people you send an online survey e-mail invitation to will respond in a day or so, especially if you have a pre-existing relationship with them. We've heard it said there are as many opinions in the world as there are noses. In other words, most people are quick to give their opinion, so long as they can give it quick. It's a busy world, after all, and time is money in any currency.

After you've gathered the low hanging fruit and caught your breath, you can boost your response rates by sending out follow-up e-mail reminders with a survey link included. Studies have shown that reminder e-mails can boost response rates. In fact, you could see a new flurry of responses on your second invitation.

Be sure not to blast the whole list again, though. You can use QuestionPro's settings to send the e-mail reminder out only to those who have not completed the survey. (For more information on those settings, read Chapter 4.) And don't be a nag. Determining how many reminders to send is still not an exact

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science. Some experts say not to send more than two reminders. Others say you can send as many as five reminders. You may test these scenarios for yourself. But be sure to give them at least a few days in between reminders. Nobody likes a nag.

Offer Incentives to Prime the Pump

How much do the answers mean to you? Enough to offer incentives such as gifts, prizes, and sweepstakes drawings? It's up to you, of course, but offering incentives is a proven way to prime the respondent pump. You could offer a $10 gift card to Starbucks, a discount on a magazine subscription, a donation to a charity on their behalf, or some other incentive. The value of the incentive should be based on how much you value the answer and what you deem valuable to the respondent. In other words, consider your target audience.

Whatever the prize, studies show that incentives in general boost response rates, and sometimes dramatically. Here's more good news. Studies show that incentives don't have to be large to boost response rates. As a matter of fact, just being willing to share the survey results may be enough for some people.

Now that you've decided on an incentive, be sure to communicate that you're giving away something right up front. If you bury that information at the bottom of your e-mail invitation, the recipient may never scroll down far enough to get to the prize offer. You also want to mention the incentive on the first page of the survey as a reminder. Oh, and don't forget to make it plain to the people who complete the survey how and when they can expect to receive the promised incentive. Whatever you do, don't forget to make good on the incentive or your reputation will betray you next time you offer a prize in exchange for opinions.

Be careful not to make your incentive too outlandish or you may scare away your potential respondents. There are so many *phishing scams* (which are e-mail or Web-based scams that set out to gather personal information from victims to

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use in identity theft rings) infiltrating the online survey world that your incentive could be mistaken for an identity theft scheme if it's too generous. You may have seen these scams. They promise a Dell laptop computer if you answer a few quick questions. Offering such generous rewards could actually send your response rates plummeting into oblivion.

Use Graphics Sparingly

Before you load up your survey with fancy graphics and Internet buttons, take a moment to consider the consequences. Here's the deal. Surveys by their nature are question-and-answer-based. You really don't need fancy graphics, or even plain graphics, in most cases. Let me take that thought process one step further — using even the simplest graphics when they aren't necessary is a recipe for low response rates. Graphics can be distracting from the survey's content and may even influence the answers.

Of course, every story has two sides. The other side of the graphics story is much prettier. Graphics can, in some cases, boost your survey responses. How exactly can graphics boost survey responses, you ask? You can use graphics strategically to communicate a prize or incentive for taking the survey. You can provide an image and Web link for a prize or incentive

Develop Clear, Concise Questions

If you want to get back survey responses that are complete from beginning to end, then make it easy for the respondent. Develop clear, concise questions. If your respondent doesn't understand what in the world you're asking about, one of two things could happen: They either skip the question (you lose out on the insight) or they misunderstand the question (and you're liable to get a wrong answer that skews your results).

If your questions ramble on and on, the respondent may lose the point. As you develop your questions, make sure to go back through and revise in a second round of development. See if you can shorten the length without losing any meaning and review to see if you can make a better word choice. Use simple language. That means avoiding acronyms that folks

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may not be familiar with or industry jargon that they've never even heard. These simple steps are sure to boost your response rates.

Many different types of questions exist: single-choice, multiple-choice, open-ended, drop-down menus, rating scales and more. Your job is to pick the right question for the right application. (To find out more about the various types of survey questions and when to use which type, read Chapter 2.)

Finally, make sure your questions stay focused on the main objective of your survey. Don't start going down a bunny trail with questions that don't relate to your questionnaire's goals. That only adds length and time to the survey and may lead to drop outs. Ideally, your online survey shouldn't take more than ten minutes to complete. You want to spend those ten minutes drumming up responses that contribute directly to your mission. Generally speaking, the fewer questions you ask, the more completed surveys you get. You can always send out a second, short survey on a separate topic.

Shout Your Results from the Rooftop

You may be tempted to keep your survey treasure all to yourself, especially if the results aren't what you thought they would be. But if you want to boost your response rates, shout your results from the rooftop. In other words, make the results public. Share them with the respondents. Human nature is curious and the respondents want to know how others responded to the same questions. Are they the odd man out? Or are they in the mainstream? People just want to know. If you offer to let them on the results, they're more likely to complete your survey.

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Chapter 9

Ten Online Survey Best Practices

In This Chapter

- Being prepared
- Promoting your survey
- Being polite

Best practices. Everybody loves them. They can save you a lot of headaches. Best practices can improve the quality of your survey, which, in turn, can improve the quality of your responses. Best practices can also save you time and money by boosting your productivity and efficiency. Indeed, there are plenty of benefits to using best practices. It's up to you to take advantage of them.

In this chapter, we share ten best practices online survey gurus are employing. Sure, there are many others. But if you can start with these ten, which range from question development to distribution strategies, then you will be well on your way to finding success with your online surveys.

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Preparation Is Key

It's been said that every hour of preparation can save you four hours in execution. Some have gone so far as to say it can save you weeks or months. That may be an overstatement in the world of online surveys. But the axiom holds true: Those who do their homework get better grades. In other words, if you take the time to prepare your survey in advance you get better response rates — and probably better responses — than if you throw together your survey in a hurry.

Take the time you need to develop questions that elicit answers you can actually use. Look at other surveys in similar industries, if you can, to get some tips. Read materials on how to develop questions and how to structure surveys so that you don't go into the process with a vacuum mentality. Have you ever taken an online survey? Take a moment to consider what you liked about it and what you didn't like about it and work the former into your survey development.

Before you rush into your QuestionPro software account to start building your survey, build a draft offline. You can create a full draft of your survey in Microsoft Word — or the word processor of your choice — and circulate it around to your colleagues to get feedback before you endeavor to Web-enable your survey. You'll want to pay close attention to the order of your questions, the questions themselves, and the choices you offer in multiple-choice queries.

Keep Your Survey as Brief as Possible

What's the first thing that crosses your mind when you discover that new best-selling business book your boss wants you to read is 600 pages and counting? Dread is a typical response. Sure, the book may be full of information that is going to put you over the top, but the length of the manuscript is so intimidating that you may decide to put it down before you ever pick it up. Although your online survey won't rival *War and Peace,* a survey with 60 pages might turn some folks off.

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The point is that you need to keep your survey as brief as possible while also getting all the results you need. If you're having trouble keeping the survey brief, here are some pointers. First, go ahead and do a brain dump. Ask every question you can possible think of. You can even ask your colleagues to do the same. Next, weed out every question that doesn't have anything to do with the key objective of your survey. (Don't discard them, though, because you may be able to use them for a separate survey in the future.) Finally, you should end up with the questions that are most pertinent to the task at hand. If your survey is still too long, then go through that process again.

Put your most important survey questions toward the beginning of the survey. That way, if the respondents drop out before the end, at least you may be able to salvage some insights from the trail of answers they left behind.

Remember, the goal is to get completed surveys. Shorter surveys have higher completion rates than long, drawn-out questionnaires that seek to know everything the respondent ever thought of concerning your product, organization, customer service, and so on. If you want your respondents to take part in another survey, whether related or unrelated, you can always plant that seed at the end of your survey with an invitation to click through to another survey or a heads up that you may be sending out another questionnaire on a different topic soon.

Use a Survey Template

If you don't have a clue how to build a survey, don't worry. You can use a survey template. QuestionPro offers free survey templates that you can copy and modify. You can even import questions from them into your own surveys. You can choose from many different template types including marketing templates, customer satisfaction templates, services templates, community templates, human resources templates, and academic/research templates designed to give you a running start on building your survey.

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Organize Your Survey Logically

Do you remember the original *Star Trek* television series? Whether you watched it back in the 1960s or are enjoying reruns today — or even if you never watched it at all — you are probably familiar with the character called Mr. Spock. Spock assessed everything in life according to logic. When it comes to organizing your online survey, you would do well to take a Mr. Spock mentality. That is to say, you need to get logical when it comes to the structure of your survey.

Put on your customer-colored glasses and look at it from the respondent's point of view. What would you want to see first? Probably the survey's intention. If you're collecting responses that will help guide the development of a new product or service, let your respondents know. If you're looking for insights into a branding campaign, let them know that, too. Communicating the goal of your study will help them align their thought processes from the get-go. (That's an added bonus for catering to the respondent's curiosity about how the data will be used.)

As you continue to walk along the lines of logic, be sure to break your survey up in a page order that makes sense. Good old-fashioned common sense will take you a long way. For example, if you were conducting a survey about orange juice, you'd want to group all the questions about packaging together, all the questions about taste together, all the questions about dietary concerns together, and so on. Dividing your survey pages up in accordance to groups of questions also makes taking the survey less intimidating. Instead of a laundry list of questions that appears to be never ending, the survey has a logical grouping that encourages the respondent to continue through to the end.

Make Your Questions Interactive

We live in an interactive society. Viewers can call in and vote on who will become the next *American Idol.* Cell phones have touchscreens that let us play video games on the fly. Cars have navigational systems that we can talk to — and they talk back. Why should an online survey be any different? With QuestionPro software, it doesn't have to be.

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QuestionPro lets you tap into the power of branching, a feature that lets you jump to a specified question based on responses to previous questions. In essence, branching serves up different sets of questions to different people.

For example, pretend you have a different set of questions for males and females. The first screen asks the respondents to choose "Male" or "Female" then serves subsequent questions based on the sex of the respondent. The survey may ask men about cars and women about cosmetics. Let me give you another example. Imagine you're conducting a survey on fitness. Your first question may ask the respondents whether they go to a fitness center to work out regularly. If the answer is "yes," then your next question might ask them how regularly, then another question after that could ask them what equipment they use most. If the answer is "no," however, there would be no need to ask those particular questions. The survey may jump ahead to a question about outdoor activities or home exercise programs.

Use the "Other" Option

If you've ever taken a survey of any kind, then you know that even the most creative lists of multiple choice answers don't always offer the option that best describes your feeling on a subject. That's the beauty of using the "other" option. Why box your respondents in to the choices that you thought of when there could be an equally valid choice — or even an oddball choice — that you may never have considered. Not only do you get more accurate responses by offering an "other" option, you also get insight into what other choices you may want to include in future surveys. If you notice a major trend in the "other" category, it may be worth adding that option on the next iteration of your survey.

Build a Library of Questions

If you start sending surveys out even semi-regularly, you'll begin to notice that you use some of the same question and answer options in all your surveys. Once you get it right the first time, in terms of question development, choices, and spelling, why do the same work twice? I believe they call that

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reinventing the wheel. You can save time by identifying those questions and adding them to QuestionPro's nifty question library. Your question library becomes your template library of questions that you can reuse across all your surveys. (To learn more about the question library, read Chapter 3.)

Promote the Survey on Your Web Site

You've spent thousands of dollars on developing a Web site — and probably thousands more promoting it — so it should go without saying that you would promote your survey on your Web site. But it doesn't go without saying. Often, people forget about this strategic venue.

When it comes to promoting your survey on your own Web site, you have a couple of options. You can use a pop-up window to get their attention and invite them to take your survey. That pop-up window should briefly communicate the purpose of the study and any incentive you may be offering, as well as how long it will take. You could also choose to post a link on your Web site in strategic locations. The home page may be the best option, or other product or service pages on your site that relate to the survey.

Post Progress Indicators

When you're doing your online holiday shopping, don't you appreciate it when the merchant offers you a progress bar as you go through the shopping cart process? It sort of calms your anxiety because you know you in advance how many hoops you have to jump through in order to seal the deal. It's always nice to know how long you have gone and how long you have to go. (That's why they put counters and timers on treadmills!)

QuestionPro makes it easy for you to add a progress bar to your survey. It won't tell the respondent exactly how many pages are left, but it will indicate on a bar how far along they are in the process. You can even specify the location or remove the progress bar if you want to. Progress bars are a

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good way to reduce survey abandonment in the same way they are helpful in reducing shopping cart abandonment.

Use Your Manners

After your respondent spends their valuable time offering you their opinions, be sure to return the favor with a thank you. It's the least you could do. After all, without your respondents your survey wouldn't be a survey at all. You don't need to get fancy. Just a simple "thanks" will do. Another common courtesy is to provide the respondents with a link or some other way to see the survey results. As you do these things, you take steps toward building relationships with your respondents that will be fruitful for your future surveying endeavors.

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Appendix

Other QuestionPro Products

QuestionPro is known far and wide for its online survey software. But did you know the same company that brings you innovations in online surveys also offers solutions for market research and customer satisfaction? Now you do. Before you close the cover on this book, take a quick minute to explore two key QuestionPro services that work hand in hand with the company's online survey software.

Solutions for Market Research

QuestionPro isn't only about simple online surveys. The company offers a complete set of online market research tools. Market research solutions offer advanced features for branching, randomization, extraction, and compound branching, for starters. QuestionPro's integrated e-mailing system lets researchers send mass invitations and track response rates. And the integration of a global panel of survey respondents gives QuestionPro's clients the ability to target the right audience.

Launching complex logic surveys

Need to deliver high caliber market research surveys? The QuestionPro Survey Builder offers advanced features that do the trick. Everything, including branching, looping, piping, randomization, and extraction is easily programmed using the wizard-based interface. And what's even better — if QuestionPro doesn't support exactly what you are trying to accomplish, then the company gives you access to experts who can custom program the survey for you.

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Enhanced tools for maximum flexibility

QuestionPro's Enhanced Analysis Toolkit includes an entire feature set for analyzing and viewing results. Grouping, crosstab, response editing, and drill down capabilities offer the maximum flexibility for analyzing data.

Building quality survey panels

It goes without saying, but we'll say it anyway: A quality panel of survey respondents is vital to the success of any online research project. It's so important, in fact, that QuestionPro has built its own panel management application called VerticalPanel to try to fill this need. Recruitment through e-mail campaigns, panel portal sign-ups, and incentives are all there.

TURF analysis

The Total Unduplicated Reach and Frequency, or TURF, Analysis is another powerful weapon in your online market research arsenal. You can use the TURF Analysis to identify a subset of items that, when taken together, maximizes the net level of consumer interest in a superset of choices. The TURF Simulator calculates optimal configurations for maximizing your *reach*, the proportion of the audience (target group) that chooses a particular option.

Let me give you an example. Imagine you've just tested consumer interest in ten proposed new ice cream flavors. Budgetary constraints only allow you to introduce three flavors this year. A TURF Analysis can identify the three flavors that, taken together, generate the most interest for the total line of your delicious ice cream. This statistical model can be used to answer questions like:

- Where should we place ads to reach the widest possible audience?
- What kind of market share will we gain if we add a new line to our model?

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With QuestionPro, any Multiple Choice/Multiple Answer question can be analyzed using TURF.

Customer Satisfaction Survey Research

Plenty of reasons exist to conduct a customer satisfaction survey. That's why QuestionPro offers you a tool to get the job done. If you aren't aware of the virtues of customer satisfaction survey research, take a moment to review these statistics. You've probably heard that it's cheaper to retain a customer than it is to get a new one. But, according to a Bain & Co. study in the *Harvard Business Review,* it's actually six to seven times more expensive to gain a new customer than it is to retain an existing one. That same study offers more telling statistics. Did you know U.S. companies lose 50 percent of their customers every five years? It's true. It's also true that a 5 percent increase in customer retention can increase profits by 25 to 29 percent.

Now, considering all these sobering facts, aren't you glad QuestionPro offers a simple automated solution for measuring customer satisfaction? The process begins by designing online satisfaction surveys using QuestionPro's intuitive survey wizard. You can also customize one of QuestionPro's survey templates to suit your specific needs.

Your goal is to establish a baseline of customer satisfaction measures that can be tracked over time. It's not just about knowing how happy your customers are today, but how that changes — for better or worse — over time. QuestionPro lets you capture these metrics through the entire customer experience and get actionable results through automated notifications, and comprehensive reports.

Satisfaction reports

QuestionPro's solution lets you measure customer satisfaction, customer loyalty, customer service satisfaction, and customer churn. The results of the satisfaction research are automatically collected, aggregated, and presented in easy-to-read formats.

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The key to the analysis is segmenting the data based on time periods or other important attributes, such as region, location, or sales rep. You can even set automated notifications to trigger an alert (via e-mail or text message) that gives a heads up on specific feedback that may require immediate attention, such as an especially irate customer that's on the brink of migrating to your competition.

To make it even easier to understand the stacks of stats, a QuestionPro Online Slide Show lets you to configure a customized view of your survey data including charts, frequency data, and an executive summary. The report can be shared online via a Web link or exported as a PDF or PowerPoint file.

CRM integration

In a world where Customer Relationship Management, or CRM, is more than a buzzword, synching what you find out about your customers in online surveys with your CRM tool is an attractive benefit. QuestionPro lets you collect ongoing feedback and integrate your customer satisfaction measurement efforts with your current CRM tool, such as Salesforce.com, HP CRM, or any other tool.

SMS polling

SMS, or text messaging with mobile phones, is all the rage these days. You may not have heard of it, but We're sure your 10 year old niece can write *War and Peace* with just her thumbs faster than you can boot your computer. Because mobile phones are so ubiquitous, it only makes sense to employ them as a medium to collect research data. With QuestionPro, your customers can tell you how great (or horrible) your business is right away in real time. They can even send you a text message when there is a problem with action alerts.

Take the mystery out of online surveys!

Find out what you need to do to make QuestionPro work for you

If your company is hungry for customer data, *QuestionPro For Dummies* is the perfect book for you. This book explains online surveys and how to use them to glean revenue-generating insights that thrust you toward your organizational goals. It shows you how you can get the answers you need and how to analyze response data so you can take steps to improve your bottom line.

Discover how to:

- *Understand online surveys*
- *Select your target audience*
- *Prepare effective online questionnaires*
- *Track respondents*
- *Send your survey to the masses*
- *Avoid spam complaints*
- *Analyze your survey results*

THE DUMMIES WAY®

- *Explanations in plain English*
- *"Get in, get out" information*
- *Icons and other navigational aids*
- *Top ten lists*
- *A dash of humor and fun*

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