

Survey Engagement and Best Practices

About Me

Sabrina Solis

Research Analyst
Centercode

M.S. Applied Psychology

Market Research, Consumer Psychology

✉ sabrina@centercode.com

🌐 [linkedin.com/in/sabrina-solis/](https://www.linkedin.com/in/sabrina-solis/)



Responsibilities of a Research Analyst

Conducting sound research through various methodologies and analyses.

Translating consumer insights into actionable recommendations.

Agenda

- 1 When to Choose Surveys
- 2 Surveys in CV
- 3 Initial Engagement
- 4 Survey Structure
- 5 Survey Questions
- 6 Survey Reporting

1. When to Choose Surveys

2. Surveys in CV

3. Initial Engagement

4. Survey Structure

5. Survey Questions

6. Survey Reporting

When to Choose Surveys

Quantitative

High-level

What

Surveys

Phone, Online, Mail-in

Qualitative

In-depth

Why

Interviews, Focus groups,
ethnographies, discussion
groups

Benefits of Surveys

Quickly gather data

Easy to administer

Generalizable data

Inform decision making



1. When to Choose Surveys
2. **Surveys in CV**
3. Initial Engagement
4. Survey Structure
5. Survey Questions
6. Survey Reporting

Surveys in CV

Qualification Surveys

Product Usage Surveys

Additional Information Surveys

Final Surveys

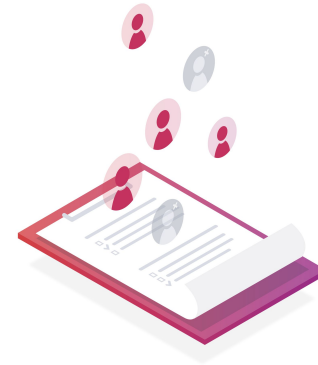


Qualification Surveys

Beginning of CV project

Recruit specific testers

Demographics, psychographics, technographics,
product familiarity



Product Usage Surveys

During CV test

Understand tester attitudes toward tasks and specific product features

Attitudes, satisfaction, usage environments, ease of use



Additional Information Surveys

Follow-up information

Following past surveys or feedback

Dig deeper into trends and insights

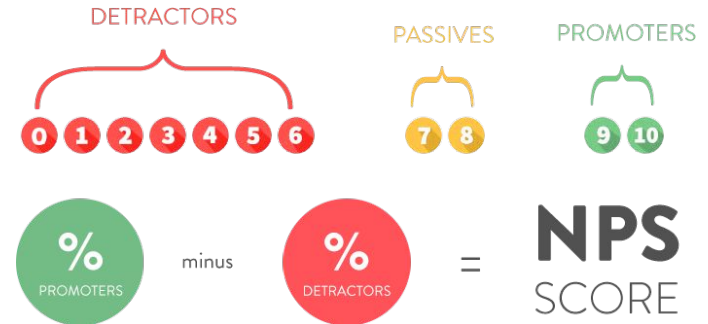


Final Surveys

End of CV project

Overall impressions of your product

Net Promoter Score (NPS), Star ratings, satisfaction



Survey Engagement Downfalls



Low click through rates



Partial responses



Data that's not useful

1. Surveys in CV
2. When to Choose Surveys
3. **Initial Engagement**
4. Survey Structure
5. Survey Questions
6. Survey Reporting

Initial Engagement

Email Messaging

Incentives

Soft Launch

Reminder Emails



Email Messaging

Personalization

What differentiates them from the general population?

Inform them of the **What**

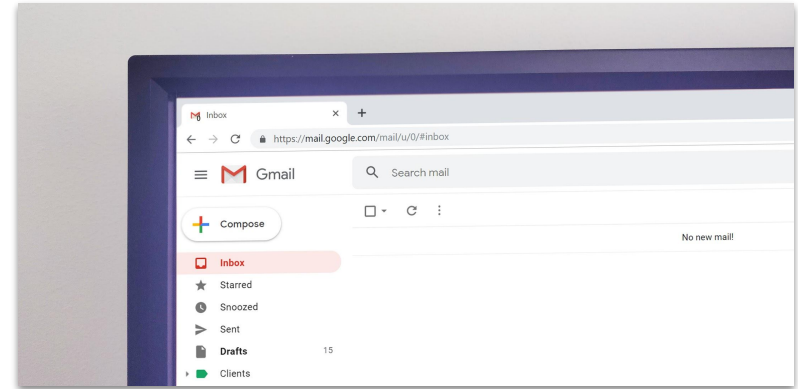
Be explicit about what you're asking for

Show transparency

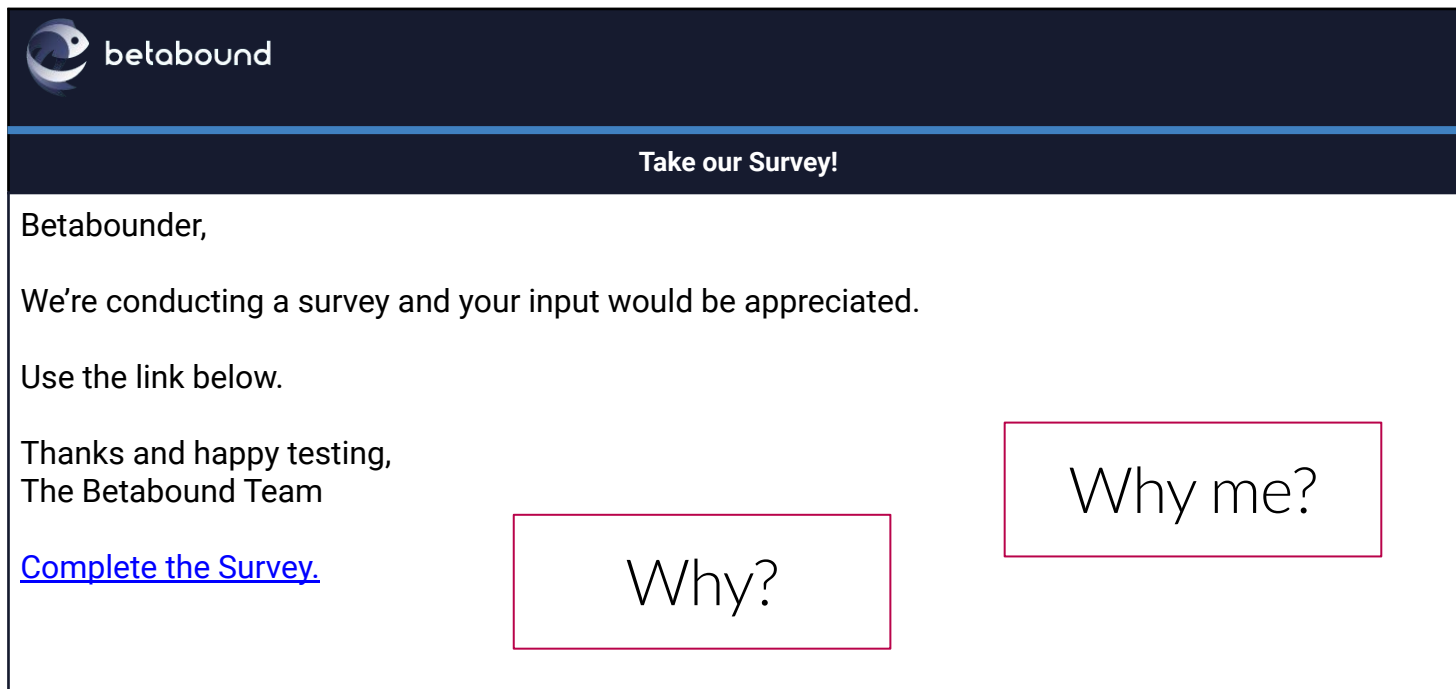
Tell them **Why**

Why should they take your survey?

Why do you need them?



Email Messaging



Email Messaging



Take our Survey!

Betabounder,

The Centercode Research Team is conducting a survey to learn more about social media habits of people between the ages of 23-35.

Don't fret, this survey will only take you 5 minutes to complete. (Less than the time it takes to [JOKE]).

Use the link below.

Thanks and happy testing,
The Betabound Team

[Complete the Survey.](#)

Email Messaging



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What

Email Messaging



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Why

Why me

Email Messaging



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Personalization

Incentives



Types of Incentives

Gift cards

Promotions

Raffles

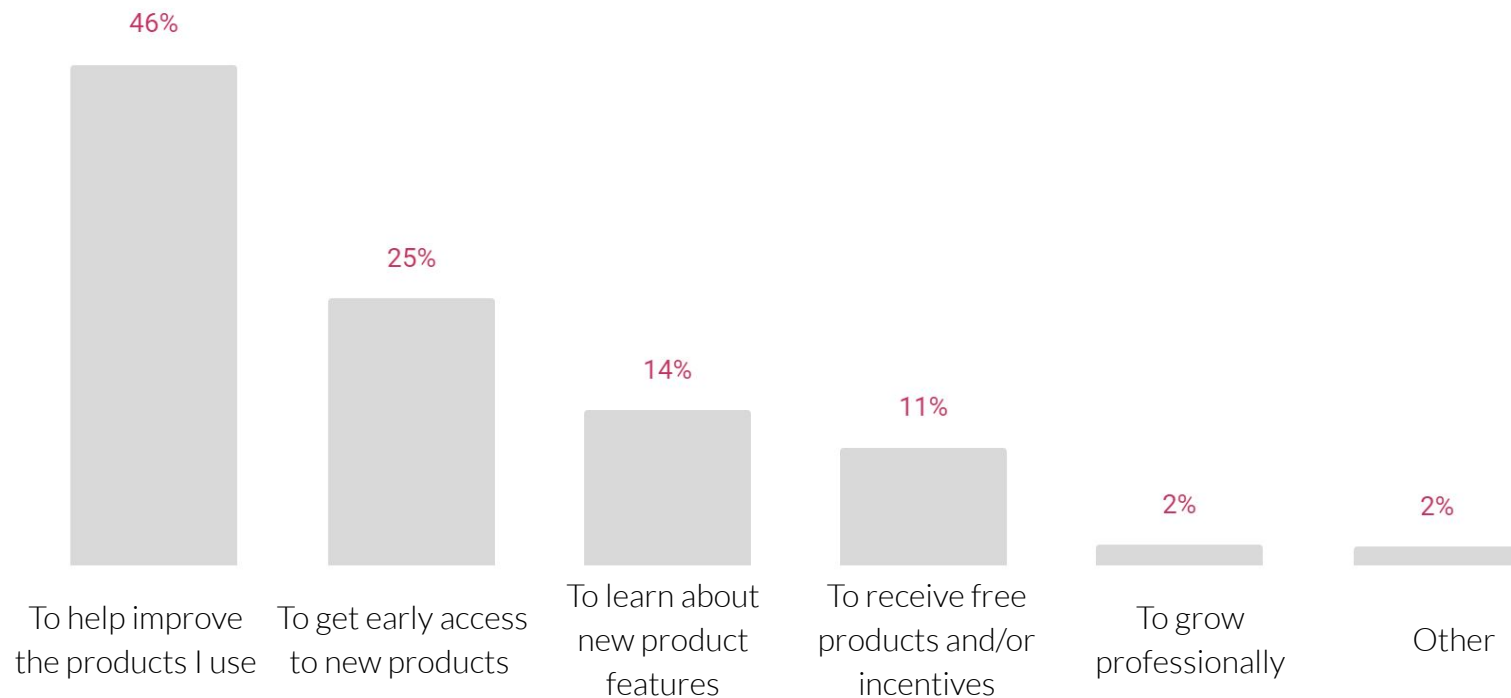
Things to Consider

Budget

Appeal

Bias

Need for Incentives



Soft Launch



The betabound logo, consisting of a stylized blue and white circular icon followed by the word "betabound" in white lowercase letters.

Take our Survey!

Betabounder,

Receive a \$100.0 gift card upon completion of this 5 minute survey.

We want to learn more about your family's experience playing our new board game! So we're reaching out to parents to give us some feedback.

Use the link below.

Thanks and happy testing,
The Betabound Team

[Complete the Survey.](#)

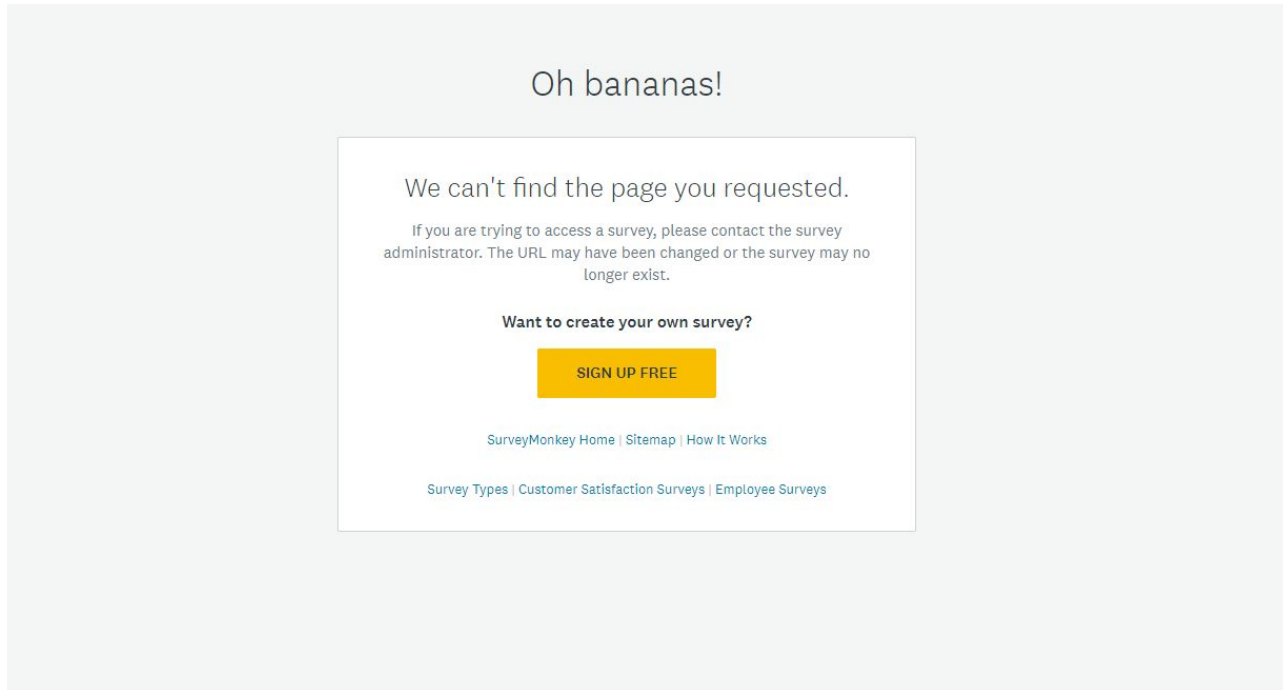
\$100.0 instead
of \$10.00!

Email Typo

Broken Link

Accidental Disqualifications

Soft Launch



Email Typo

Broken Link

Accidental Disqualifications

Soft Launch



What's your first name?

Sabrina

What's your last name?

Solis

What's your work email?

sabrina@centercode.com



Thank you for completing our
survey!

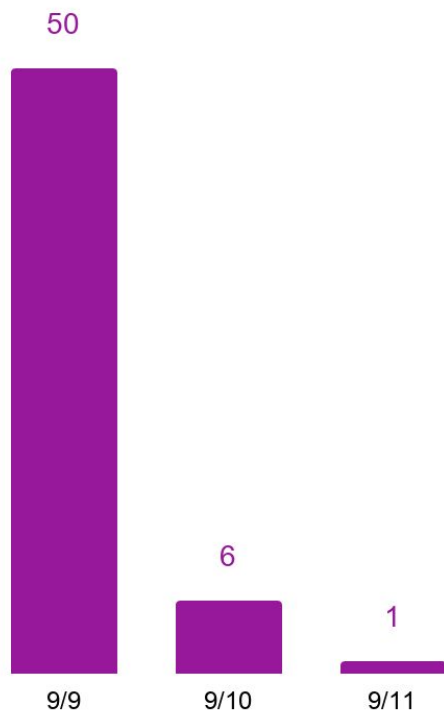
Submit

Email Typo

Broken Link

Accidental Disqualifications

Reminder Emails

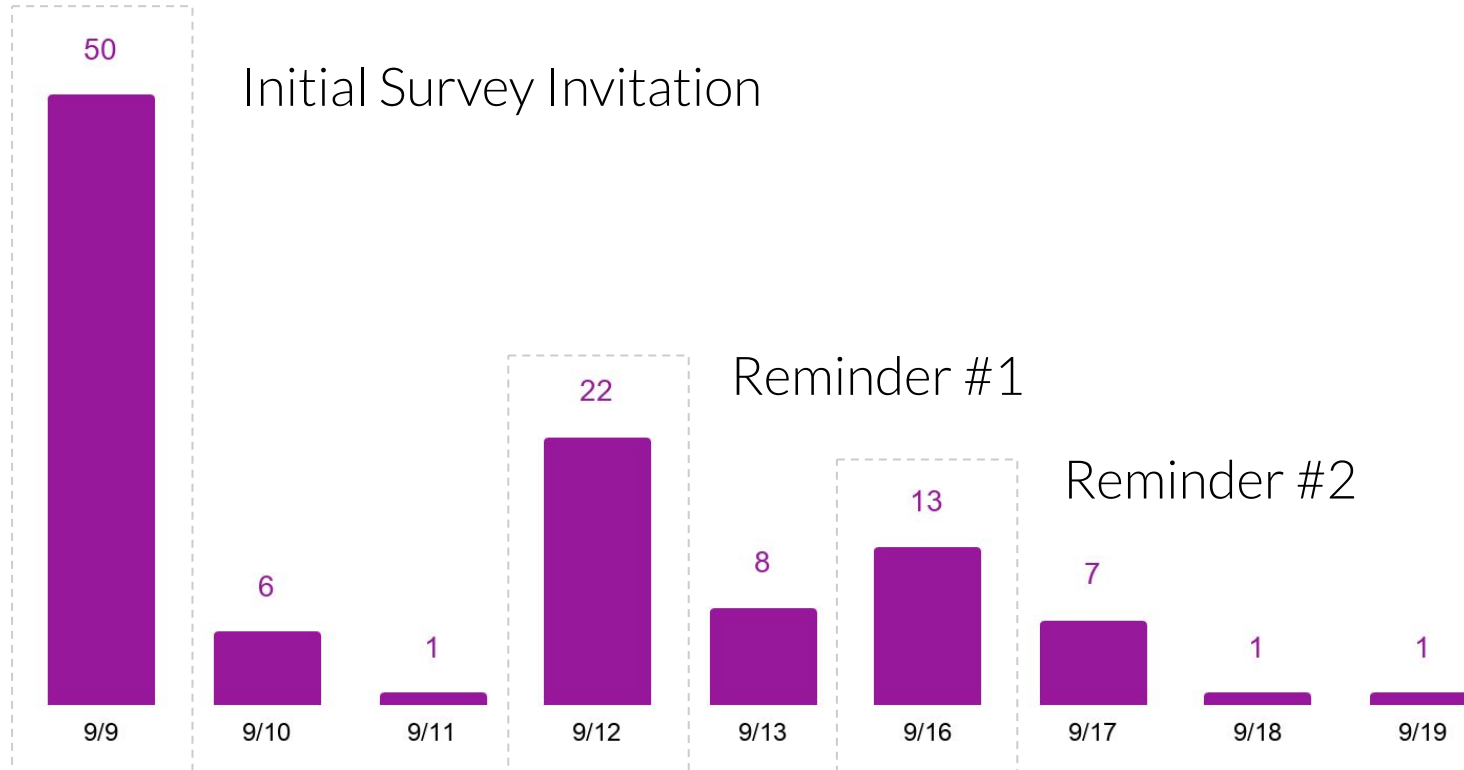


May not be seen

Go to Spam folder

Opened it, but forgot to take the survey

Reminder Emails



Reminder Emails

Personalize the email message

Consider incentives

Soft launch the survey

1. Surveys in CV
2. When to Choose Surveys
3. Initial Engagement
4. **Survey Structure**
5. Survey Questions
6. Survey Reporting

Survey Structure

Survey Length

Survey Flow



Survey Length



Next

Survey Length



Things to Consider

Drop off

Fatigue

Speeding

What You Can Do

Review your questions

Keep it short

Create flow

Survey Length



Things to Consider

Drop off

Fatigue

Speeding

What You Can Do

Review your questions

Keep it short

Create flow

Survey Flow

General



Broad, easier questions

Specific/Complex



Difficult, time-consuming questions

Wrap-up



Demographics, final thoughts

Survey Flow

Please indicate the extent to which you agree or disagree with the following statements:

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
I have the TV on for background noise	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I leave the TV on but don't always watch	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I always pay attention to shows when the TV is on	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I watch TV everyday	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please describe in 1-2 sentences why you leave your TV on for background noise.

Survey Flow

Which of the following social media platforms do you have an account on? *Select all that apply*

- Instagram
- Facebook
- Twitter
- Pinterest
- Snapchat
- None of the above

How satisfied/dissatisfied are you with **Snapchat's** platform?

- Very dissatisfied
- Dissatisfied
- Neither satisfied nor dissatisfied
- Satisfied
- Very satisfied

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Survey Questions

Be concise

Avoid jargon

Test your survey



Be Concise

How many times have you been to McDonald's in the past year?

0

1-5

6-10

11-15

16+

I don't go to McDonald's



Be Concise

How often do you typically visit McDonald's?

Daily

Several times a week

Once a week

Several times a month

Once a month

Several times a year

I don't go to McDonald's



Avoid Jargon

Special words or expressions that are used by a particular profession or group and are **difficult for others to understand**.

Slang

Basic, Keep it real, YOLO

Industry specific terms

AI, Application, Outbound, VPA



Avoid Jargon

How satisfied/dissatisfied are you with the iPhone's screen recording feature?

Very dissatisfied

Dissatisfied

Neither satisfied nor dissatisfied

Satisfied

Very satisfied

Avoid Jargon

How satisfied/dissatisfied are you with the iPhone's screen recording feature?

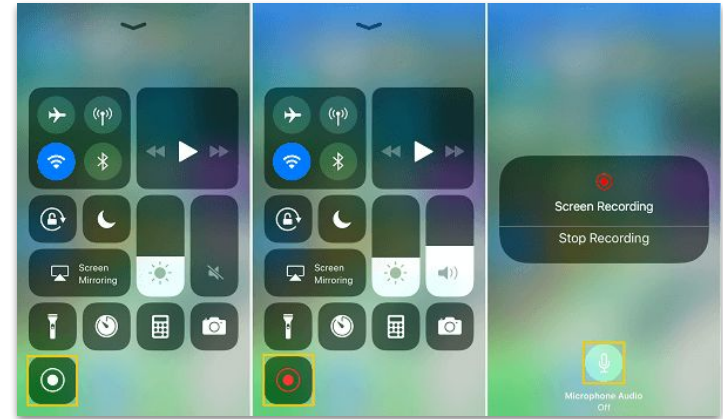
Very dissatisfied

Dissatisfied

Neither satisfied nor dissatisfied

Satisfied

Very satisfied



Test Your Survey



Soft Launch

Check for any spelling/grammar errors and technical issues.



Survey Flow

What thought process are you trying to understand?



Question Clarity

Does the wording of the question make sense? Are the options representative?

Test Your Survey



Which of the following best indicates your role in owning video streaming services?

I am the account holder

I have access to an account

I do not use video streaming services

Describe your role in owning video streaming services.

What do you think this question is asking?

How did you arrive at your answer?

What do the words “role in owning” mean to you?

Test Your Survey

Which of the following best indicates your role in subscribing to video streaming services? Select all that apply

I am the account holder

I have access to an account

I do not use video streaming services



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Survey Reporting



What insights do you
want to report



Who will be seeing the
report



How will you best
visualize the data

Merge Data Types

Quantitative

High-level

Easy to understand

Provides the what

Qualitative

Gives context

Tells a story

Provides the why



Only **23%**
of Haitian children
attend preschool.

The average Haitian adult has
less than 5 years
of schooling

Just **61%**

are literate.

**TOGETHER WE CAN
CHANGE
THESE STATISTICS.**



Chanella

a 5-year-old girl from
Burundi created to shine

 APR 6TH, 2014

 WAITING OVER
1 YEAR

[SPONSOR ME >](#)

Chanella lives with her parents and has no brothers or sisters. Her parents struggle to provide for the family. Her father is a farm laborer and her mother is a farm laborer. Despite their efforts, it is difficult to meet the family's needs.

Chanella is growing up in a poor area in Burundi. The HIV and AIDS crisis has severely damaged the social fabric of entire communities, impacting parents' abilities to care for their families. Families survive on a diet of root vegetables such as cassava and potatoes, as well as bananas, maize, and rice. The terrain is mountainous and the climate is warm, making many areas vulnerable to drought during the dry season.

Chanella is in primary school and her favorite subject is sports. She helps at home by carrying water. She likes to play group games. She is in satisfactory health.

Your sponsorship commitment will help provide Chanella and her community with increased access to healthcare, medicine and training in disease prevention. Parents and caregivers will learn the importance of education, so children can attend school. Your support will train farmers in agricultural techniques and provide pigs and cows to increase their family income. And through our partnership with local churches, children will learn about the surpassing love of Jesus Christ.

Product Sound Quality Needs Improvement



55%

Of testers reporting
problems with the sound
quality of the product

40%

Of testers reported being
dissatisfied with the product
overall

*“When I played the Music Machine the sound quality was not very good. **I kept hearing static in the background.** I expect the sound to be more clear.”*

Recap

Deliberately choose to use a survey

Create a concise, personalized message

Build a structure with flow

Be concise and test your survey

Report both qualitative and quantitative data

Thank You!



Sabrina Solis

✉ sabrina@centercode.com

in [linkedin.com/in/sabrina-solis/](https://www.linkedin.com/in/sabrina-solis/)

