10 QUESTIONS TO ASK WHEN CHOOSING A SURVEY SOLUTION FOR MARKET RESEARCH

Introduction

Effective market research is vital to all businesses for many reasons. Among other things, it tells a company how it rates against its competitors, identifies market trends and indicates if a new product is likely to be successful.

If your company is looking for a survey solution to help it undertake effective market research, you need to choose carefully. To do this, you must ask the right questions. This paper lists questions that should be asked and outlines why they are important.

1. What Features does the Application Have?

One of the worst things that can happen is that you acquire a survey solution and then find it doesn't have certain crucial features. A survey must obtain the data you require in the format you need it and an application that prevents this is no good to you.

You must ensure that your chosen survey solution does not restrict you in any way. Think about what you require and make a list of every feature you need. Try to prioritize them so you know what you absolutely must have, those features that are important but not essential and any that will be nice to have but aren't too serious if you don't have them.

If you can find a solution that exactly meets all your needs, that's great. But, in reality, you might have to settle for less, so at least make sure you know what you cannot do without.

When compiling your list, don't just put down what you need now. Your requirements might be simple at present but this may not always be the case. Think ahead a little and try to anticipate future needs because you don't want to keep changing your survey solution every time your situation alters. Look for an application that is flexible and will adapt to growing needs.

2. Is it Easy to Use?

You may want a comprehensive application that meets all your needs now and in the future but you don't want it to be too complicated to use. Although these might appear to be conflicting demands, a well designed user interface can hide the complexity of the software.

However complex the product, you want it to be relatively simple to use, otherwise there's a danger that people won't use it. Or, if they do, they may not use it effectively because they may be unable to get the best out of the application.

Ideally, you want an application that is intuitive, guiding you through the process of setting up and running a survey. Ask if templates are provided, if there are libraries of surveys you can adapt for your own use and if there are standard questions that can be included. Using previously prepared and proven material is an easier and quicker process than starting every survey from a blank piece of paper. A degree of automation will also help because certain aspects will be done for you rather than having to add each feature manually.

Ease of use applies to survey respondents as well as those who develop the surveys. If you expect people to complete a survey online, it must be clear what is required of them. A confusing interface or lack of focus will result in respondents either ignoring the survey or abandoning it before they get too far.

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You need to encourage people to respond. That means being able to develop a survey that is clear, has an attractive appearance and is as short as possible while still gathering all required data. The application must be capable of pre-filling all information that is known so you don't waste respondents' time.

3. Can Survey Questions be Structured Logically?

A sure way of improving survey response rates is to keep the survey relatively short. People usually don't have the time or the patience to complete long questionnaires and will often discard those that take more than ten minutes or so to go through.

Surveys can be kept short and to the point by only asking relevant questions. What is relevant may depend on the answers to previous questions and so the application must have a branching feature. This will take respondents on a particular path based on the answers they supply and ensure that everything that is asked is completely appropriate.

Another useful feature may be the ability to generate alerts when specific answers are given to certain questions. If a customer expresses extreme dissatisfaction with some part of your company's services, you need to know why this is so you can take corrective action. If, on the other hand, they are very happy, you might want to get in touch to ask for a testimonial or to use them as the subject of a case study. It all adds to the effectiveness of the research.

Organize your survey into sections that focus on different information. For example, you may have general questions about your company, specific ones about its products and services, and those to obtain information about the respondent. If the survey solution allows anonymous responses, this may lead to a higher response rate and more truthful answers to questions.

4. Are Surveys Customizable?

It's better if surveys go out with your organization's name and house style rather than that of the firm that provides the application. Apart from anything else, a survey that looks professional will encourage greater response.

You need an application that allows you to apply your company's branding throughout. That means inserting company logos, applying established styles and colors, and using your own terminology. If you run global surveys, it's also a big advantage if you can develop multi-language questionnaires from the same base design.

5. Are Different Publishing Methods Supported?

The old method of running surveys was to print out multiple copies of survey forms, which were then mailed out to potential respondents. There was then a wait, often of several weeks or more, for completed forms to come back. And, of course, they didn't all come back and you were never sure if they would do.

Surveys have also been traditionally conducted by telephone. However, this can be a very labor-intensive process and contacting respondents at a convenient time, if at all, can be a problem. People also tend to be wary of this type of contact due to the prevalence of marketing calls.

Modern surveys have to be faster to process, must produce better results and be easier to control. You need an application that allows you to publish them through several channels in addition to the mail and over the telephone.

Many surveys are now completed online, with invitations going out by email and survey forms available on the company's website. People can then complete the survey when they have the time and don't feel pressured into doing so. You can also keep track of who has responded and can send email reminders to those who have failed to do so, increasing the response rate for the survey.

If you do run surveys online, you have to be prepared for people accessing them with different devices. These can include PDAs and smart phones, so your survey solution has to be able to handle the different screen sizes.

Whatever modern techniques you use, you may still have to allow for legacy methods. Old survey material can be a valuable resource that you don't want to lose. Check, therefore, that it is possible to scan any paper-based survey results and combine them with those held in digital form.

6. Does the Supplier Offer Full Support?

No matter how simple the application may appear to be to use and irrespective of how straightforward your needs, it's still important the supplier provides adequate support. Their website should have FAQs, articles, tips, guides and other useful sources of information.

Check how you can contact them if you need help or advice. This may be by email, online chat or over the telephone — more is better so you have a choice. Make sure the support is reasonably local and not outsourced because you want to talk to people who really know the product and don't want the added difficulties of language and time differences. Be sure you know what support is included in the contract and when it is available.

Depending on who is to use the application and to what extent, you may need training for staff members. Ensure you know what training is available, where it's based and what it costs.

7. Are Survey Results Fully Analyzed?

Interpreting your survey results can be a challenge, especially if you've got a lot of respondents. So you must ensure your chosen survey solution is able to interpret, analyze and report the results in a way that is useful.

The whole point of running a market research survey is to get results that you can act upon. To do that, the results need to be presented in ways that are meaningful, easily understood and make the outcome clear.

Check the type and range of analysis output that is provided, whether this is tables, graphics and charts, and the availability of advanced statistical analysis. And find out how automated the analysis is, or the extent of work needed to produce it.

8. Does the Survey Solution Integrate with Other Applications?

Market Research is a business function along with everything else that you do. Consequently, it should work alongside and fit in with all the other processes.

Ideally, you want an application that will integrate with your other systems since this will ensure a smoother process, reduced input and better results all round. Integration should apply at both ends, so that you can feed data into your survey at the start and then output results to other applications when you have finished.

Front end integration may mean obtaining data from your customer or CRM systems, such as salesforce. This will enable you to identify the potential respondents for the survey and transfer their contact details so that the distribution of the survey forms or invitations is automatic. It also means

that you can pre-fill the survey data you know so that respondents are saved unnecessary work and the time they spend on the survey is shorter.

Back end integration involves transferring the results of your research into other systems so that it can be used there. This avoids the need for manual data entry and the potential input errors that may occur.

You may want to transfer your results into spreadsheets for additional analysis or to output as PDF files to present the outcome of the survey. You may also update your databases, such as your salesforce files, with specific results from the survey.

It's important you check out the extent of available integration so you know how well the survey solution will fit in with your applications. Being able to output data in CSV (comma separated variable) format allows flexibility since it means you can often transfer data to systems that have no specific integration. In addition, the availability of APIs (application programming interfaces) will smooth the whole process of transferring data from your survey into your business systems.

9. Does It Support Safe Working with Others?

In the same way that you want the survey solution to operate in conjunction with other systems, you may also wish to work with other people when using it. And it's important this use is safe, secure and properly organized.

Collaborative working will allow a team of people to process a survey, which is essential if it is a large one with many respondents. One group may be responsible for setting up the survey while another may distribute it and other staff may deal with the results. Alternatively, a team may work on the whole market research project, with members dealing with the work as it arises or being responsible for specific areas.

However you organize the survey work, it's important it is correctly controlled by the survey tool. This has to ensure, for example, that two people don't process the same respondent at the same time, don't duplicate input and that the overall status is known at any time.

You need to be able to set up privileges for individual users to prevent unauthorized changes being made. For overall security, you have to be able to track the changes so you can always find out what has been done.

Security is important because you are dealing with personal data and people's opinions. You need to be satisfied that data will not be lost or be transmitted in an insecure way, especially if it's hosted on another company's servers rather than on your own equipment. Check that all transmitted data is securely encrypted and if LDAP is available to ensure consistent login strength across all your applications.

10. Does the Supplier Have the Necessary Experience?

This might seem a pointless question because you naturally expect the supplier to have full knowledge and experience of any product they support. However, it may be the most important question of all because, with market research, you want a lot more than simple product knowledge.

You need to find a supplier that has in-depth knowledge of the subject, not just of their own survey solution but of the whole topic of conducting market research and running surveys. You want the supplier to have a flexible approach so that the support they provide is as little or as much as you need.

Market research is a complex subject and you must have the confidence that your supplier can provide help and advice when you need it. More than that, you have to be able to work with your supplier long-term, if necessary, on specific projects.

Collaboration with your survey solution supplier can be as important as with other members of your team. In fact, the supplier may almost become part of the team.

You may just want advice on a particular aspect of a survey or to check that the tone of your questionnaire is appropriate. At the other extreme, you may need your supplier to handle a complete market research survey on your behalf. You may want them to design the whole questionnaire, send out the invitations, process the responses and present a report of the results.

Whilst you may have the confidence and the resources to conduct your own surveys, you never really know what is likely to happen in the future. A particularly important or complex market research project may stretch your capabilities. So, you need to be sure that you can work with the supplier and they have the experience, knowledge and resources to handle all your requirements.

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