

The Effective Survey Project Plan

By Dr. Michael Bewley
Analysis Survey Services

A survey project usually originates when an association is confronted with an organization problem and the existing data are insufficient. If you need input from a number of people, must get results quickly, and need specific information to support association decisions, then a survey is the most appropriate technique.

Many survey studies start with a general hope that something interesting will emerge, and often end in frustration. A detailed survey plan will help **Analysis Survey Services** focus your survey project, while guiding your implementation and analysis so the survey research is finished quicker. You can then concentrate on implementing well-supported decisions.

A well-designed survey plan answers the following general research questions:

Questions	Benefits
What will be learned?	Generate data that answers the association questions you have
How long will it take?	Keep the survey project focused and on schedule
How much will it cost?	Anticipate direct and indirect project costs

You can only answer these questions if you draft a survey plan prior to implementing your survey. Hence, an integral part of a well executed and a successful survey is the "planning quality."

To assist us in developing a useful and effective survey plan for your project, Analysis Survey Services has created a **Survey Development Worksheet** that helps you provide us with the necessary information to begin.

Survey Value

The first step in defining your survey project is to understand its scope and importance to your organization and how the information you gather can realistically benefit your work. Survey value depends on three main factors. They are:

1. A clear definition of the decisions you need to make
2. The relative cost of making an error in those decisions
3. The amount of uncertainty the survey will reduce

To illustrate how these points work together considers Coca Cola's decision to introduce New Coke in 1984. After conducting blind taste-tests, Coke decided to change its formula because they believed that consumers preferred sweeter-tasting Pepsi. To support this decision, they conducted several focus groups, which said that the company should not change its formula.

Define decision	Do we change the Coke formula?
Cost of making an error	High (Coke lost market share and brand loyalty after making this decision)
Amount of uncertainty	High (Blind taste-tests could not evaluate brand loyalty or consumer reaction to the change)

To resolve the contradictions posed by these two qualitative studies, Coke should have conducted a quantitative survey. Instead, they ignored the focus group results. Numeric results from a survey could not have been manipulated or miss-interpreted the way that their qualitative research was. They believed that the level of uncertainty that their second study would clarify was low, when actually it caused more uncertainty. New Coke turned out to be a disaster with consumers and was a very expensive blunder.

Looking at this example, we can see how important it is to identify the information you need and define the decision that you must make for this survey project to be successful. Objectively identify, before the survey, how high the cost will be to make an error in your decision. Knowing this cost, identify the amount of uncertainty the survey is likely to reduce, and include a follow up survey in your plan if there are additional issues to be clarified once your initial survey is complete.

This stage of planning will assist you in framing the importance of your project, and justifying costs to colleagues or clients.

Survey Cost

Next, estimate the total survey cost. You want to make sure that you do not exceed your budget and realize, only after the survey is complete, that you spent more than what you intended did.

A good survey does not come "cheap," although some methods are far more economical than others are. Apart from human resources time, three significant costs that you incur are:

1. Actual cost of creating the survey instrument
2. Cost of inviting your respondents and encouraging them to participate
3. Cost for data entry and analysis

Defining the Project

At this point, you need to plan the elements of the survey process and define the project. By setting a measurable objective, you can learn the effectiveness of your survey and it will help you in reinvesting the information you learned for future surveys.

A good example of an Objective Statement would be:

Measure site visitor demographics daily for the next eight weeks to see how effective our online advertising campaign is at drawing our target audience.

Calculate how long the survey will take, including time to invite the respondents, gather data, enter, and analyze results. How you conduct, your survey affects how long each of these steps will take. For instance, when compared to traditional survey techniques using mail and telephone, Internet surveys provide the ideal solution for information gathering because of their fast turnaround. An entire web survey project can be completed in a couple of days, where printing alone will take a week for the mail survey.

The next thing you identify is how you are going to invite your respondents to take the survey. Several ways that are commonly used are emails, website links, or online advertising. By identifying at least, one tangible or intangible benefit that you are offering to your respondents for answering the survey will help you compose an invitation that helps respondents to click through. A tangible benefit could be in the form of money or a gift; whereas an intangible benefit is the chance to voice opinions or contribute to research, they view as valuable.

Defining the Audience

Who is going to respond to your survey? Your target audience could include your customers, prospects, employees, or members. A survey panel is mainly dependent on your objective since it will help you identify your target audience.

Next, focus on the sample size, or number of respondents you would need for your analysis to be valid and accurate. Based on the population about which you are drawing conclusions, the greater the level of accuracy desired and the more certain you would like to be about the inferences to be made from the sample to the entire population, the larger the number of respondents must be.

Bear in mind that not all the people who you invite might respond to the survey. Hence, you also need to estimate the percentage of those invited whom you want to respond. With the mail-based surveys, the response rate is traditionally low, hovering in the 2 to 3 percent range. Telephone surveys allow for retries when the contact is not available so can yield results at the ten percent level. Most web-based surveys however are announced with an e-mail message that contains a link to the survey page. This format allows users to respond at their convenience and results in significantly higher response rates.

Defining the Project Team

You need to identify the internal resources you may need to complete this survey process. This is dependent on your company and on the kind of survey, you are conducting. A few internal resources you might need are:

1. Human Resources: Necessary for employee satisfaction surveys

2. IT: Customized interactivity or additional templates
3. Market Research: Data analysis and reporting

Defining the Project Timeline

What are the tasks and is there a specific order in which they need to be completed? Defining a project timeline will help list the entire set of tasks that are to be conducted for the survey and assign them to specific people in your company. By setting a timeline that includes each of these tasks, you can keep track of their commencement and end, and maintain control over the survey process. In the Survey Development Worksheet, we have identified a set of tasks associated with most survey projects and are presented to give you a starting point for developing your own timeline in creating an effective survey plan.