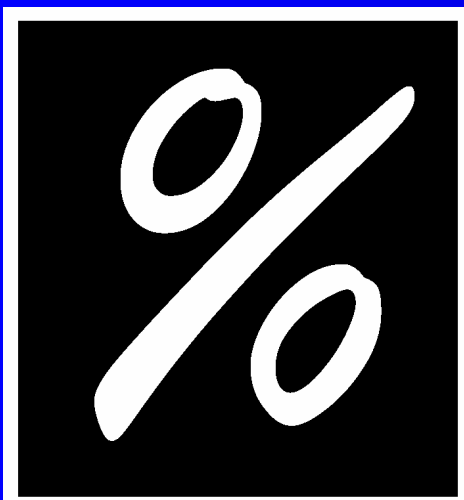
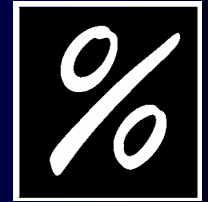


# Riley Research Associates

*Survey Design: Tips Tools & Techniques<sub>TM</sub>*



*Michael J. Riley, APR, PRC  
Director of Research,  
Riley Research Associates*



# Design Strategy

1. Set your objectives
2. Identify key audience(s)
3. Determine most effective method(s)
4. Develop actionable questions
5. Avoid the “five fatal errors”

# Setting Objectives

“If you don't know where  
you are going, any road will  
take you there.”

*-Lewis Carroll*

# Consumer Change Theory

- Awareness →
- Perceptions →
- Attitudes →
- Behaviors

What specifically would you like to have happen - or not happen?

# Determining Your Audience

## The Old Model:

- Customers
- Prospects

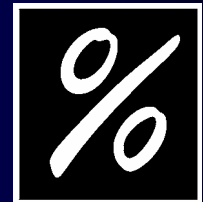
# Real World Audiences

- ⑩ Neighborhoods
  - ⑩ Legislative / Regulatory agencies
  - ⑩ Consumer / General media
  - ⑩ Financiers
  - ⑩ Neighbors & Activists
  - ⑩ Vendors / Allies / Channel partners
  - ⑩ Colleagues
- and of course...
- ⑩ Customers & Prospects
- Community groups
  - Trade media
  - Websites / Web 2.0
  - Employees
  - Consumer / News media
  - Trade unions
  - Competitors

# Selecting Methods



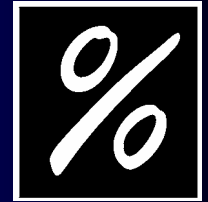
- Based on the type of information needed
  - Formal – “scientific” (accurate to +/-)
  - Informal – yet credible
  - Facts vs. Opinions
  - Visual elements – (ie, concept testing)
- Based on the target audience
  - Ready & able
  - Diverse & hard to reach
- Based on the \$ value of the information



# Methods

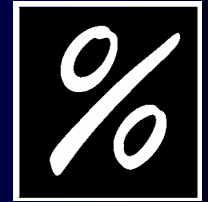
- Secondary first
  - On-line research
  - Web 2.0 – “Crowd sourcing”
- Primary second
  - Telephone interviewing
  - Web / Mail-back / Fax-back
  - Focus groups / 1x1 (first last or both)
  - Intercept interviewing





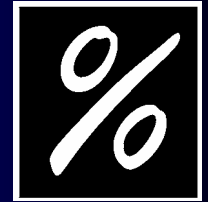
# Selecting Audiences

- Constituent publics – general and “key”
  - Targeted and Random
  - ~~No~~ A few “squeaky wheels”
- Vendors / Partners / Employees / Regulators / Neighbors:
  - Personal or telephone
  - “Captive” audiences – web, paper



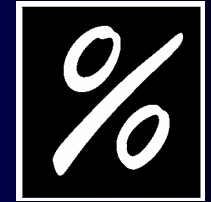
# Selecting Audiences

- List brokers & Internal sources
  - Consumer
  - Business
  - Political
- Rigorous sampling
  - Multiple attempts
  - Dinner time & weekends (except Super Bowl)
- Demographic verification
  - During or post



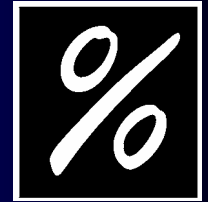
# Questionnaire Design

- Winning Participation - #1
  - “Hook” them with the introduction
  - Speak their language
  - What’s in it for them?
  - Tell them why their opinion matters
- B-2-Business, B-2-Government, Media
  - Work the gate-keeper
  - Listening, empowerment, egos
  - Incentives (future needs, spiffs)
  - Share your results



# Questionnaire Design

- Overall approach:
  - Begin with a few interesting, relatively simple and non-threatening items
  - Be efficient with their time
    - 10 minutes
    - Skip non-pertinent questions
    - Save personal questions for the end
    - String similar question / answer types together



# Questionnaire Design

- Overall approach...
  - Order of questions
    - Awareness (blind and *initially* blind)
    - Initial attitudes & perceptions
    - Informed perceptions
    - Motivations & inclinations
    - Communications vehicles & sources
    - Anything else they want off their chests

# Questionnaire Design



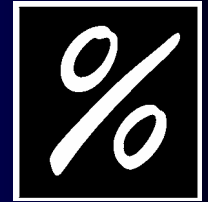
- Answer types
  - Ratings / Comparative Scales (1-10; Good-Bad)
  - Rankings (<6 items)
  - Multiple responses (1<sup>st</sup> & others)
  - Verbatim (themes & gems)
  - Numerical / Categorical (\$, visits, tons, demos)

# Questionnaire Design



- Final check...
  - Anticipate likely responses - consider probes
  - Read it aloud (to a colleague – or cat)
    - Flow / Segues
    - Timing
  - Pre-test on would-be audience & refine

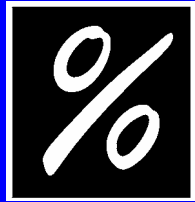
# After the Study...



**Communicate with key constituencies:**

- Share findings
- Let them know what's next
- Provide opportunities to engage
- Involve them and they will thank you





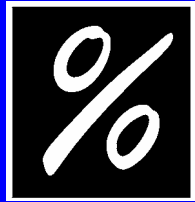
# THE FIVE FATAL ERRORS

- Don't ask what you don't want to know
- ◆ Settle for *convenience* samples
- ◆ Fail to hear from *key audiences*
- ◆ Fail to review expectations (+/-)
- ◆ Hope to change the world in once cycle



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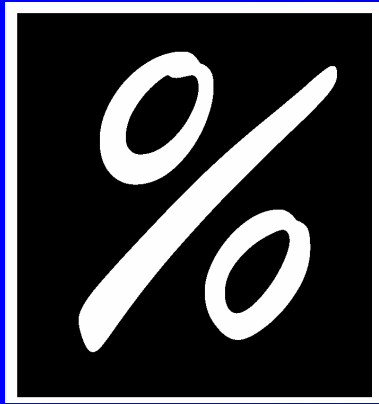
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# Verbal Blogging

The background is a solid blue color. A thin, light blue curved line starts from the top left and arcs towards the right. A darker blue triangular shape is positioned on the right side, pointing towards the center.



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