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

- Neighborhoods
- Legislative / Regulatory agencies
- Consumer / General media
- Financiers
- Neighbors & Activists
- Vendors / Allies / Channel partners
- Colleagues

- Community groups
- Trade media
- Websites / Web 2.0
- Employees
- Consumer / News media
- Trade unions
- Competitors

– and of course…

- Customers & Prospects
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 (1st & 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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Verbal Blogging