

Chapter

13

Survey Said!

Make Surveys and Proprietary Research Work

Surveys move markets. When the University of Michigan's Survey of Consumer Confidence is published, stock markets gyrate and consumer-buying behavior can change, impacting the overall economy.¹ The U.S. government's survey of leading economic indicators influences decisions from the purchasing of raw materials to the hiring of workers. Politicians follow every rise and fall in the polls as they formulate campaign or policy strategies. Surveys and their influence are everywhere.

What's ironic is that in a world awash in data, business leaders continue to bemoan the shortage of useful information to help them run their businesses. Most companies are constantly searching for more current, accurate, and sharply focused information to make strategic and tactical decisions.

Many businesses are swamped with so much information about their operations that it's hard for them to look outside their own walls and discover what's going on with their competitors, suppliers, and customers. Surveys can help by providing executives with the information they need.

Surveys are measuring devices. A well-executed survey can reveal the overall condition of an organization, problems in a promotional

campaign, or the reasons for workers' dissatisfaction, to name a few possible results.

■ WHY CONSULTANTS SHOULD CONDUCT SURVEYS

When you collect survey data, analyze, and report on it, the results become a crucial part of your firm's intellectual assets. Surveys reinforce your firm's expertise, bring new ideas to your targeted clients, generate leads for new business, and expand your network of contacts.

A survey also provides you with market visibility. You'll interact with clients and prospective clients as you prepare a survey, conduct it, and present its results. Few marketing activities pack the punch of a survey when it comes to impressing and meeting potential clients.

Publicity you receive from surveys establishes you as the authority on your topics. When you are an acknowledged leader, clients will call you. Use the survey results to help build relationships with clients.

A successful survey is usually not a one-shot deal. Think of a survey as being more like a franchise, an ongoing initiative that you bring to the market at regular intervals. Over time, you stake out territory that your competitors can't match. You become the expert in resolving the issues addressed in the survey. Often, the results of consultants' surveys lead to the development of new services that consultants offer to clients.

GUERRILLA INTELLIGENCE: SLICE AND DICE

The data from a well-designed survey serves many purposes in addition to the initial report of findings. The information that you collect can be useful for preparing articles, speeches, and related reports. You can customize a survey report and present it to a particular client or a group of clients in an industry. Include provocative data from the survey results in proposals and on your Web site. Look for other media channels to distribute some or all of your survey results. Newspapers, television, radio, Web sites, and industry publications always need fresh and compelling information.

■ PROCEED WITH CAUTION

Conducting and marketing a survey can take on a life of its own, and surveys come in all types and sizes. Some consultants run unscientific polls on their sites by asking visitors for their opinions on a particular topic. They run the survey for a period of time and publish the results. If you'd like a snapshot of how your Web site visitors or zine readers feel about a topic, this method will work.

If you want to understand more substantive issues impacting the business community, you'll want to conduct a scientific survey, rather than an informal one. Even if you are an expert at survey design, development, and analysis, it can be resource intensive to move from your initial idea to the publication of your report. It is possible to outsource the entire effort to a polling firm, which can shorten the survey life cycle. But that will also cost substantially more than if you complete the survey yourself.

■ SEVEN CHARACTERISTICS OF A GREAT SURVEY TOPIC

The centerpiece of your survey project is the topic you cover. With a compelling topic, you can influence clients, contribute knowledge and answers to tough problems, and build your business. If your topic is repetitive or irrelevant, you're simply wasting your time. Find topics that hit the mark.

Review industry publications, local newspapers, and the Internet for ideas and interesting new angles. Interview your clients on the topics they'd like to see covered. Review the surveys that are currently underway so you don't repeat them. Consult with academicians, industry association executives, civic leaders, and even politicians. From these interviews, you'll develop a great list of potential topics.

Sort through your list and apply the following seven criteria to find a topic your market will respond to favorably:

1. *Uniqueness*: Is it different? Does the topic offer information on a new area or a new slant on an existing subject? Is it a compelling and valuable subject that would make readers pick up the survey report and read it? Resist creating another consumer price index.
2. *Popular demand*: Use your market research to determine whether demand exists for the topic. Remember the survey is not for you, but for your clients and others.

3. *Practicality*: The worst response you can get to a survey report is, “Oh, that’s nice.” If you are planning to use the survey for clients, give them findings that can guide their future actions. Make the results usable and actionable (for example, that 75 percent of the survey respondents are changing their mobile computing strategies). Many companies will be interested in that trend.
4. *Understandable data*: Some survey topics are too complex or narrow because they try to gather every possible shred of data. Make your survey easy to grasp, topical, and don’t require respondents to go through training to fill it out. Make it simple and you’ll get a higher and faster response rate.
5. *A focus on the future*: Readers want to get a glimpse of the future, so give it to them. When you ask questions about the history of a specific process or practice (for example, outsourcing), also include questions about the respondent’s plans for the future (you might ask whether the respondent plans to spend more, less, or the same funds on outsourcing next year).
 Questions about the future give readers actionable items to consider, and the value of your survey franchise improves as a result. It also gives you an opportunity to measure how respondents acted when you obtain survey results in subsequent years.
6. *Continuity*: Choose a topic that lends itself to a recurrent survey. It will allow your clients to compare results on a year-to-year basis and understand how respondents are reacting to issues previously raised. The costs of a survey are higher in the first year than in subsequent years because of start-up expenses. As time passes, the survey process becomes easier and less costly. Plan to run your survey many consecutive years to gain economies of experience. Publishing your survey results annually also puts you in the limelight each year.
7. *Targeted topic*: Choose a topic of deep interest to your clients and target markets. Stay within your area of expertise so you will be a credible spokesperson on the nuances of the survey results.

■ TAKING THE PLUNGE

Before putting the final touches on your survey, consider several options for conducting the survey that will produce the highest impact

at the lowest cost. In some cases, a client will sponsor an industry survey to ferret out the implications of a specific issue. Clients can help prepare the survey topic, identify the mailing list, and assist with analysis, if needed. Many consultants receive a fee for conducting the survey, preparing the findings, and presenting the results to the client's executive team.

When clients wanted detailed information on how retailers in their industry used trade funds, they commissioned consultants to conduct a survey. The clients participated in the survey development in the first year, and then allowed the consultants to carry on the survey in subsequent years on their own.

Cooperative arrangements work well. Some consultants create teams of experts drawn from consulting, academia, and the media to conduct surveys. When several parties share the costs and run a survey, it's usually completed more quickly and the results are more objective.

Outsourcing is now an option for virtually any activity, and survey design, development, and management are no exceptions. For a fee, you can commission a highly professional survey that requires little participation on your part. Some consultants use this option so they can focus on developing marketing programs to promote the survey, instead of dealing with the administrative details of survey preparation and analysis. Outsourcing can be costly; it will depend on the scope of the survey you plan to conduct.

Just as there are DIYers—do-it-yourself types—in the home improvement business, some consultants prefer to manage the entire survey process from beginning to end. With low-cost, online survey tools, like those offered by firms such as SurveyMonkey.com, conducting a survey is less costly than in the past.

GUERRILLA INTELLIGENCE: COLLABORATE

Collaboration with others is a hallmark of guerrilla marketing, and surveys lend themselves particularly well to productive partnerships. In one case, a consulting firm teamed with a local university and newspaper to conduct a survey on the city's future technology needs. The consulting firm, in conjunction with university faculty members, designed the survey; the local newspaper contributed use of its Web site to receive survey responses; and the consulting firm prepared the mailing list, analyzed the results, and published the joint report, which was featured for weeks in the local media.

GUERRILLA TACTIC: CHOOSING THE BEST SURVEY OPTION

There are many approaches to conducting a survey. Answering the following five questions will help you pick the option that is right for you and your targeted clients:

1. How much time do you have to spend on the mechanics and marketing of a survey?
2. How will that commitment affect other marketing initiatives?
3. How much can you invest in out-of-pocket expense?
4. Is in-house expertise available to manage the project?
5. Will your topic last for more than one survey cycle?

You'll still need a team to manage the process because surveys have many moving parts. They include developing the topic, preparing the list of names, creating the questionnaire, following up with respondents, and developing final reports. You'll also have to assign someone to handle the marketing program.

■ STEPS TO A SUCCESSFUL SURVEY

Test your topic extensively before beginning the survey. Consider testing to be a required part of your research. Run your choice of topics by clients, your associates, industry executives, and academics. Specifically ask them if they think that the topic needs to be surveyed. Would it be valuable for the industry or would it be unnecessary or redundant? If you learn that the topic has been surveyed, find out when and by whom, and study the results. Get copies of prior surveys to distinguish them from the project you propose. Ask someone objective to review questions to be sure they are unbiased.

During testing, ask your contacts to suggest any unique angles or approaches. If the people who help in your test have diverse backgrounds, they should come at the issue from different perspectives. This could flesh out the topic, which would make your survey even more valuable.

Identify your business and marketing objectives and clarify who will constitute your target audience for the final report. For example, is your target for a project on HMOs the chief executive officers, chief

operating officers, chief financial officers, prospective investors, or possible management teams? When you've identified the audience, ask whether your information will be compelling to them.

Decide which outcomes you hope to achieve. Are you looking for visibility, to generate business leads, build new relationships, or any combination thereof? What contributions do you expect your survey to make and to whom?

Follow these rules in developing your survey questions:

- ▶ Keep questions short.
- ▶ Make all questions clear, simple, and quickly answerable. Try to give respondents a straight line through the survey.
- ▶ Every question should be fully understandable at a single reading.
- ▶ Eliminate any words or language that readers cannot immediately understand.
- ▶ Test the clarity of your questions on people who are not involved in the target industry.

Decide how to distribute the survey—via hardcopy, Internet, or telephone. Ask permission to contact respondents with in-person, follow-up questions. Clearly state the deadline for submitting the completed survey.

It is often helpful to convene panels of respondents in a live setting, who complete the survey while discussing the issues it raises. The input from the panel can add texture to the findings, and the meeting can provide introductions to potential clients.

Before writing your survey questions, develop a working hypothesis that states what you want to test with the survey. For example, you may hypothesize that the HMO industry is lagging behind academic medical centers in an important business process. After you

GUERRILLA TACTIC: WHAT'S THE POINT?

Write the survey so that respondents can answer all questions quickly. Create an easy, logical flow of concise questions. Get right to the point. Don't compose questions that require respondents to write essays; design them for short answers. Whenever possible, include boxes that respondents can check.

have your hypothesis, identify the steps you must take and the specific questions you must ask to prove or disprove it.

Work backward from the final report to the survey questions. Before you write your survey questions, rough out the format for the final report, including the charts you'd like to include. Begin writing report outlines. This will ensure that you cover all the topics that the report should include. Sketching out what you expect to find helps identify all the data you need to prove or disprove your hypothesis, and can suggest questions you might miss, forget to ask, or pose differently.

Also identify the charts, illustrations, and comparisons you'll need when you receive the survey data. This will help you create survey questions that will simplify your report preparation.

Create a clear and compelling value proposition for the survey respondents. Explain in two sentences the real difference that the survey will make to a participant. In one case, a consultant promised to show a manufacturing executive how the company stacked up against 50 of its top competitors in areas like product development, manufacturing processes, and customer service. The client was interested enough in such valuable benchmark data that he participated in the survey.

Describe exactly what respondents will receive as a result of their help: a free copy of the report, a personal briefing on the results (if desired), or a customized data set showing how their situation compares with others. Providing a compelling value proposition will dramatically increase your response rate because survey respondents know they will receive highly useful information in exchange for their time.

Plan your marketing program well before the time when you expect to receive the survey results. Create a coordinated media campaign to maximize the impact of and publicity for your results. Early in the survey development stage, identify your marketing objectives and the best outlets to publish your results. Also determine where you can publish articles, editorials, and case studies, as well as where you can give speeches, workshops, and seminars. Since surveys have long lead times, time your project so you can release your results at conferences and other high-profile events. Also decide when to distribute the results to respondents.

Plan a systematic follow-up campaign. The media is deluged with survey data, most of which isn't high-priority news. Therefore, it's easy for your results to slip to the bottom of the heap. Plan a coordinated follow-up effort. Call two or three days after sending your results to media contacts to confirm receipt. Ask if they understand the results, their implications, and volunteer to explain whatever isn't

GUERRILLA TACTIC: BEFORE YOU PUBLISH THE RESULTS

Think about getting a separate review team to examine your findings. Recruit objective academics and experts who have practical experience in the field being surveyed. Make sure that they don't have a stake in the outcomes. Ask them to look for patterns in the data and for results that make them say, "Aha." Most surveys contain powerful information that will elicit such a response, but finding it often takes fresh eyes and time.

clear. Ask if they need any additional materials and give short deadlines; otherwise they'll take forever.

Give yourself sufficient time. Surveys invariably take longer than expected. Virtually every aspect of a survey can require follow-up and many details must be tracked. When you're dependent on others who are outside your control, response time increases. It's also tricky to put pressure on people whom you've asked for a favor. After the first cycle, the process gets easier, but during the initial go-round, something always goes wrong. Surveys provide spawning grounds for Murphy's Law.

Create firm privacy controls. Set your privacy policy early in the project so that it's completely in place when you approach prospective respondents. Privacy leaks can destroy your credibility, and the word will get out and kill future cooperation.

Assure respondents that you won't disclose information that they provide. If any part of the demographic information inadvertently reveals the identity of a respondent, mask that data. Potential respondents always want to know who else is participating in the survey, so give generalized answers that don't name the participants. Although your survey documents must provide a profile of respondents and demographic information, don't name people or companies.

■ GETTING THE SURVEY TO THE MARKET

Marketing your survey can be a tougher job than conducting the survey, so prepare your marketing program at the same time that you design your survey. Before you send a single press release about the survey, your first job is to be sure the survey results get into the hands of every survey respondent who requested one, along with an invitation to review the results one-on-one, or in small groups with other survey respondents.

GUERRILLA TACTIC: WHAT'S IN A NAME?

Surveys have a shelf life. The 2006 Annual Survey of Trends in Hotel Management, for example, is less interesting to readers if they first see it in the middle of 2007. Inform readers when the survey was conducted, but do not use the year in your survey's title. Instead, call the survey "The Annual Survey of Trends in Hotel Management."

These one-on-one or small group briefing sessions fuel the marketing power of your survey. You have the opportunity to present the results, listen to the concerns of the respondents, and build relationships that could result in future project work. It's not unusual to find challenges to your findings in these sessions, so you also have a great opportunity to refine the next survey and add or delete questions. As you conduct the survey, approach industry association executives, business leaders, and civic organization officials about sponsoring a speech or small seminar on the survey findings. Many of these organizations plan their programs well in advance, so approach them long before you complete the survey. Offer to write a summary article for their respective newsletters or Web sites, so members will know the survey is available and a seminar is scheduled.

Arrange for publicity in as many appropriate media outlets as possible, including television, radio, and the business press. Put the results on your Web site and your clients' sites and intranets, if possible. Include survey information in your zine, blog, and any other media where you publish.

Conducting a survey is among the toughest, but highest value marketing activities in your marketing program. In a world swamped by data, you'll find clients will welcome organized, new information with enthusiasm. Treat your survey as you would a paid client project. Use the same rigor and attention and your marketing effort will hit its mark.