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Survey Layout Basics

The essential parts

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so… what are the pieces?

1. **Greeting/Intro: give 1st name, a time-to-complete, incentive, assurance of Confidentiality.** *May* **give survey's** *general* **topic**
(most Customer Service follow-ups divulge the client name; otherwise, typically just divulge the Research Firm's identity; often in a Customer Service survey, it's obvious how they 'discovered' you – or why they contacted you specifically; with most other surveys [of prospects, all category users, etc] we often add "Your name was selected at random…").

2. **Qualifying Question** ("Where you the person who made the call to our 1-800 Help Line?"). If Yes, continue… If No, …

3. **Macro questions** (category habits, etc)

4. **…Less macro….** (segment, brands)

5. **……even less macro** (product, model, overall satisfaction, …)

6. **Very Micro …** (criteria, satisfaction on specific aspects,…)

7. **1 to 3 Open End Questions** (gain fresh info, let them Vent or Cheer)

8. **Transition Statement** ("the following questions are for classification proposes only…")

9. **Sensitive Questions**

10. **Thank you & goodbye**

Classic Survey Layout

When do we ditch the 'Classic' survey layout?

- When we need *Top-Of-Mind*! Include any such query early, before you 'poison the well' by getting them to think about the topic too much (or, worse yet, mentioning the brand itself!)

- When *the sample is a subject matter expert* ('smalltalk' context setters to establish their category savvy is unnecessary)

- When they're a longstanding *current customer* (their supplier or service provider has tons of data accumulated on them; asking general questions may be seen to be just wasting their time)

- When *the survey is 'in-context'* ie the situation when/where we recruit renders 'setup' context-setting queries redundant ie onsite survey accompanying new menu offering at a fast food restaurant

- When *the medium itself or situation limits* the survey length Eg a text survey from telecom carrier after an away-from-home inquiry on roaming package options, or a wifi login survey at a coffee shop where customers usually only sit for a few minutes.