

# MERKLEY

marketing group inc.



## Create Effective Online Surveys:

### 6 Steps to Success

How well do you know your customers, clients, or members? As a small business, association, or nonprofit, you may talk to some of them, but how do you find out what they are *really* thinking? Online surveys. Using online surveys can help you make more informed decisions about your business or organization—because you'll have a broader, more representative view of what your customers, clients, or members *really* think about your products, services, and communications.

Need ideas for new products or services? Online surveys can help ensure that you are offering your customers, clients, or members what they truly want and need and give you a deeper understanding of what it takes to satisfy—and keep—them.

Online surveys give you the insights you need to meet your customers' or members' needs... generate new ideas... and grow your organization.

Following are 6 key steps that can help you conduct an online survey that delivers the information and insights you need to advance your business or organizational goals.

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#### Step 1: Define Your Survey Goal

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Define what you want to measure:

- Overall satisfaction
- Customer referrals

List what you want to know:

- Satisfaction with product/service
- Should we change how we communicate?

Evaluate your list of goals:

- Can it be measured?
- Can you act on results?

If your answer to either question is no, remove goal

Prioritize list based on what's important

Choose one goal per survey

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#### Step 2: Develop Your Questions/Answers

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Turn what you want to know into questions and answer choices

Questions should cover one topic

- Limit number of opened-ended questions
- Make most questions closed-ended
- Limit required must-answer questions

Answers should provide what you need to know to make a specific decision

No more than 5 questions per survey

- Less for prospects or new customers
- More for VIP or established customers

Organize your questions

- First question is simple and interesting
- Use logical order
- Place demographic questions at the end

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### Step 3: Select Your Audience

Make sure you have interacted with them recently

Solicit feedback from everyone who experienced what you are measuring:

- From your website
- At your storefront
- Called customer support
- Attended a seminar

### Step 4: Invite Participants

Determine distribution method

- Link on your website
- Send an email invitation with link
- Embed a link within an email campaign

Checklist before inviting

- Proofread questions and answers
- Preview and test your survey

Communicate why you are conducting the survey; thank them in advance for their time

Activate survey and invite participants

### Step 5: Analyze & Interpret Results

Review overall data results to look for key trends and patterns

- Group results based on answers to select survey questions
- Look for common responses and differences

Read individual text response to better understand needs and concerns

Monitor changes over time:

- Compare this year to last year
- Measure impact of improvements

### Step 6: Take Action

Share results with colleagues and make plans for improvements and changes

Once the changes are made, communicate them back to your customers so they feel they had a voice in the process, and can take advantage of your improvements



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