

The Complete Guide to **SURVEYING**

Using **Internal** and **External** Stakeholders
to Guide Marketing Decisions

Stealth

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Introduction

Let me start by emphasizing the fact that formal research absolutely has a place in marketing decision making.

Conducting focus groups with qualified discussion moderators will produce qualified data that will guide important decisions such as whether to rename your company or the best region to open up your next storefront.

However, sometimes your timeframe or budget doesn't allow for expensive focus groups, and you need another option to gain insight. Enter : **Online Surveys**. They are cheap, they are easy, and they will get you answers to your questions.

Tip #1:



Create a clear objective that you want your data to guide.

Many people will shy away from e-surveys because they don't know where to start, or want to leave well enough alone. I cannot stress enough how important it is to factor feedback from employees and customers into your decision making, especially for marketing and operations. It can be easy to assume that your steering committee or executive board is educated enough to make the best decisions, but if you do not value what your employees or consumers are wanting to tell you, then you are losing true insight that could better your business and bottom line. Your marketing firm or agency can act as a third party guiding-board to structure the surveys so they do not lead to pre-determined answers. They can also help analyze the data to decide what actionable items have arisen.

Does the customer's
brand perception
match my branding
efforts?

Do my employees
understand our growth
goals? Are they helping us
achieve growth?

What can we find out
about lost business that
will help us course
correct?

Who Should I Survey?:



The best part about informal surveys is that you can decide how robust your survey should be. There is no right or wrong group size as long as you consider the weight that you will give to the group's opinions. For example, a survey of a Board of Directors might only yield ten different inputs, but will be valuable for setting the operational base for the next year. Surveying your past clients might yield hundreds of results and lots of different opportunities for learning and course correcting in your marketing. Targeting your marketing message and tailoring your survey questions to each group will help gather the exact feedback you need to better your company.

Incentives

Though many will appreciate the opportunity to give feedback, you might also consider offering an incentive for their input to garner more response. This would not allow you to conduct a truly anonymous survey, but people could volunteer their information in return for the incentive. A good incentive will change with each survey group. For example, customers (past, current or prospective) might volunteer to provide feedback for a \$10 gift card, where employees might be enticed by a raffle for PTO. Ideally, each group would be jumping at the opportunity to give insight, but realistically, you want to make sure that you have a big enough sample size to create true data.

Tip #2:

Don't try to create marketing opportunities with an incentive (i.e. SWAG for prospective customers). Stick with items they would find useful.



Anonymous Feedback

Generally speaking, an anonymous survey will entice the participant to answer your questions more honestly, especially employees who might fear retribution for any negative feedback. Should you want to offer an incentive, you could invite a third party or marketing agency to conduct the survey



on your behalf. Through this method, the results will remain anonymous, but the responders will still have a pathway for their reward.

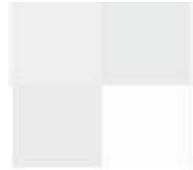
Always explicitly state that the survey will be conducted anonymously in the introduction to the survey so there is no confusion.

How Often Should I Survey?:

- **Retainer Customers:** Once a year if the client experiences minimal business changes, but usually it is safe to have your client expect one every 6 months. Make sure your customer has been engaged with you for at least 6 months before surveying. Deploying surveys too soon can return uneducated responses.
- **New Customers:** 3 months or less requires an introductory survey which narrows down the onboarding process. These can be in a weekly, monthly, or quarterly reoccurrence until the customer evolves from new to existing.
- **Per Project Customer:** It is safe to follow up each project with a survey which can eliminate future issues. This will look for personal satisfaction with processes as well as the overall success of the project. Along with projects, if you host events, contests, etc. it is safe to have a follow up survey after the fact.

Tip #3:

Strategically time your surveys in order to pull in the best responses. It is safe practice to allow two months for complete responses of a survey



Surveying Platforms

The awesome thing about living in this technology age is that there are a ton of great options for almost any type of digital platform you may need, and survey platforms are no exception. Depending on the level of complexity you need, you can find free templates or reasonable monthly rates that provide analytics and dynamic question building. The latter is a good choice if your marketing team wants to develop persona-based marketing or wants to utilize a certain user flow of their survey.

Each platform has user support so building out your survey should be no sweat. In the next few slides, we'll introduce you to our recommended platforms: Survey Monkey, Google Forms and Survey Gizmo.

Surveying Platforms

Survey Monkey

The breakdown for this platform is survey design, audience selection, and analysis of your results.

The key takeaway from this platform is the ability to use the Survey Monkey Audience which can be tailored to your specific targeted audience (moms, video game players, etc.). A downfall of this platform is the basic/free package offers minimal use, but there are 3 more packages which offer much more. Also, data acquired cannot be exported.



SurveyMonkey®

Gold Package (\$25/month): Unlimited questions/responses, custom themes, dynamic questioning, text analysis

Our insight: This platform is easily the most familiar with online survey respondents and has responsive (mobile) functionality that isn't available on some other platforms. It's easy to use, which makes it a great starter for the new surveyor.

Surveying Platforms

Google Forms

This easy to use platform will help you create polls, quizzes, surveys, and contact information collections. Once created, you are able to track, analyze, and add people into your forms. These forms will be able to be customized with art and color schemes to make your form fit whatever genre they will be utilized for.



Free Package:

Unlimited surveys and respondents, can embed survey into emails or website

Our insight: While the price tag is right, this platform does not allow for custom aesthetics, only theme options and a logo addition. You will not be able to create question branches within this system.

Surveying Platforms

Survey Gizmo

This easy to use platform will help you create polls, quizzes, surveys, and contact information collections. Once created, you are able to track, analyze, and add people into your forms. These forms will be able to be customized with art and color schemes to make your form fit whatever genre they will be utilized for.

surveygizmo.

Basic Package (\$25/month):

Video & Audio embeds, dynamic questioning, A/B testing

Our Insight: Consistent gold-star reviews shows that this platform is preferred to those who are really trying to raise the bar of their online surveying.

Surveying Platforms

surveygizmo.

ZOH Survey

Client Heartbeat

Typeform |

Survey Planet™

Question Guide

Now that you know the basics of why, how and when you should survey, let's get to the nuts and bolts: What are the best questions you can ask to get answers to your marketing questions? Your project may be as big as deciding whether or not your marketing mix is reaching your customer base, or you may want to test a new campaign concept to an audience.

We've prepared a catalogue of questions to help you get started. This list is by no means exhaustive, and we strongly encourage your marketing team to brainstorm questions that will be directly related to your project.

External Stakeholder Survey Questions

- Do you think our organization has clear goals?
- Do you feel our organization is transparent about its goals and objectives?
- How would you rate our organization as on par to meet {Objective 1, 2, 3...}?
- Do you feel there is sufficient contact between us and our stakeholders?
- Are your concerns handled positively and efficiently?
- Do you feel the company is well run? Efficiently?
- In what areas do you think our company needs to improve?
- What specific advice would you give to improve {Operations, Marketing, etc...} in the next fiscal year?
- Overall, how responsible do you think our organization is towards all its stakeholders?

Employee Survey Questions

- Do you understand the {Marketing, Operations, etc...} objectives of the organization?
- Do you know the role and duties you are responsible for to help the company meet its goals/objectives?
- Does your work align with the organization's goals/objectives?
- Does your team inspire you to do your best? Does your team help you to complete your work?
- Do you have the resources and information to make correct decisions?
- Do you understand the structures and processes of the organization?
- Can you ask for help if there is an unexpected issue and do you know who to ask?
- Do you feel that you receive adequate information in a timely manner from the management team?
- What specific advice would you give to improve {Operations, Marketing, etc...} in the next fiscal year?

Former Customers Survey Questions

- What month/year did you complete work with our company?
- Who was your main contact?
- What is the reason you are no longer using our services?
- How would you rate the services we provided?
- How would you rate our cost structure/bidding process?
- What could our organization improve on?
- What areas did our organization excel?
- Would you consider doing business with our organization again?
- Would you recommend us to your colleagues?
- What is your overall impression of our organization?

Current Survey Questions

- What month/year did you start working with our company?
- Who is your main contact?
- How did you first hear about us?
- How would you describe us to a friend?
- How likely are you to recommend our service/product/organization to a friend?
- What would you describe as our biggest strength?
- What is one big thing we are missing?
- What are your everyday challenges?
- Is there any specific service you wish we offered?

Prospective Customers Survey Questions

- What industry are you in?
- Has your organization identified your top 3 {Marketing, Operations, etc.} goals?
- Who are the decision-makers, and what is their buy-in to these goals?
- What are your main {Marketing, Operations, etc.} struggles?
- Have you previously received a bid for service from our company?
- Do you feel our company's bidding process is on par with other companies?

Tip #4:

Keep surveys short and to the point. If a survey is too long, participants will lose interest. Stay within 10 - 20 questions.



Evaluating Your Answers

- ✓ It is vital to tailor your questions in way that useful information is able to be extracted. For example a large number of former employees may feel they were undertrained, so in order to take advantage of that make sure you assess your training department.
- ✓ This information will be used in order to increase productivity, increase traffic, increase efficiency, understand clients and their expectations, etc.
- ✓ Customer feedback whether they be former, new, or existing gives insights into what your customers need and want from you. Along the same lines, employee feedback will allow your organization to see what employees need and want.

ABOUT US

At Stealth Creative, we make it our business to ensure people notice our clients' business. Reach out today to schedule a review of your program with our marketing team.

Stealth

www.StealthCreative.com