

UST EDUCATION

# Become a Survey Savant: Modern Strategies for Building Actionable Insights

MIGHTY



CITIZEN

# Brianna Martin

Director of Brand Marketing  
@ Mighty Citizen

Nearly 15 years in marketing,  
12 with associations

Strength: Marketing strategy

Weakness: I'm a surprise twin



MIGHTY  
CITIZEN



# Branding and digital transformation for mission-driven organizations.

Research & Analytics

Branding & Strategy

UX Design & Content

Web Development

Marketing, Media & Search



MIGHTY  
CITIZEN



MIGHTY  
CITIZEN

# By the End, You'll Be Able To:

- Describe the shortcomings and benefits of surveys
- List the six principles of good survey design
- Create a survey strategy that collects the data you actually need *and will use*
- Analyze and interpret the results so you can make *meaningful* changes



# Surveys Can Tell Us:

- What motivates our members?
- How can we better engage with our audiences?
- Who are our members?
- Why aren't <insert audience> engaging more?
- How good is our stewardship?





Research  
Kills  
Opinions

**Analysis &  
Action**

**Questionnaire**

**SURVEY**

**Logic**

**Collection**



**MIGHTY  
CITIZEN**

# The Shortcomings & Benefits of Member Surveys

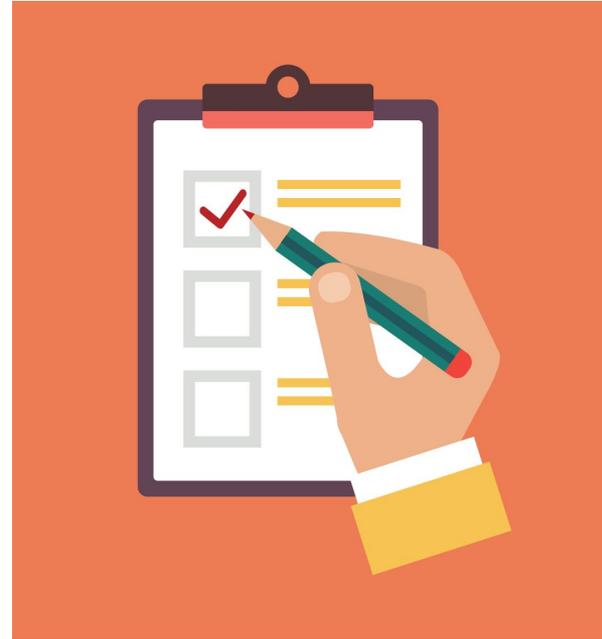
MIGHTY



CITIZEN

# The Case Against Surveys

- People estimate
- Inaccurate answers
- Can't predict the future
- Bad questions don't "stink"
- Hard to reach statistical significance
- Surveys are wide but shallow



# 4 Key Benefits of Surveys: F-A-C-E

- Flexible
- Anonymous
- Cost-effective (and quick)
- Extensive



# So, should you conduct a survey?

---



MIGHTY  
CITIZEN

# Poll

My organization makes impactful changes based on every survey result we receive.

- a. Yes
- b. Sometimes
- c. No





#SchittsCreek

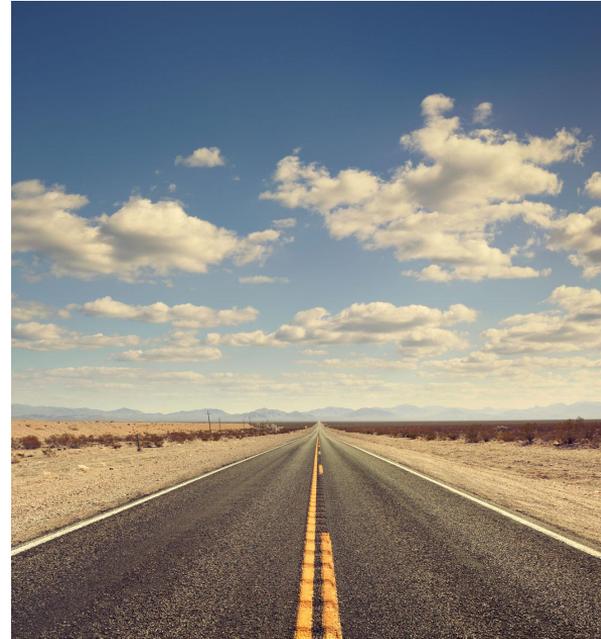
**THIS WAS JUST A  
BIG WASTE OF TIME**

# Six Principles of Effective Survey Design



# #1: Purposeful

- What is your goal?
- What will you do with the information?
- Who has buy-in?
- Different surveys for different goals



# Two Types of Surveys



**GET TO KNOW**



**COMPARE**



**MIGHTY  
CITIZEN**

# Example of Goals

## MEMBER SURVEY

### **Primary Goal:**

Better understand the value proposition of [---] as a way to increase member recruitment, engagement, and retention.

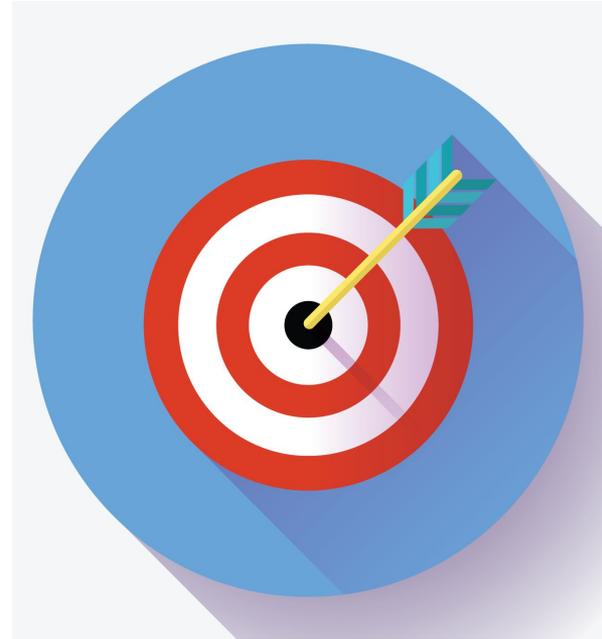
### **Secondary Goal:**

Identify data to include in a special report covering the current state of the profession.



# #2: Targeted

- How many people should I survey?
- Which audiences are you going to target?
- Small and representative vs. big and broad



# Target: By Age



# Target: Engagement



**LAPSED**



**ENGAGED**

# Target: Experience



**EARLY CAREER**



**VETERAN**



# Target: By Greatness



**TWINS**



**EVERYONE ELSE**



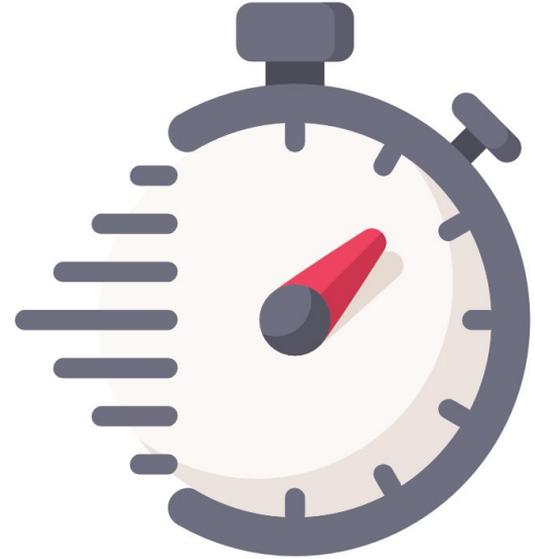
To target an audience, you must  
have **good data** in your database.



MIGHTY  
CITIZEN

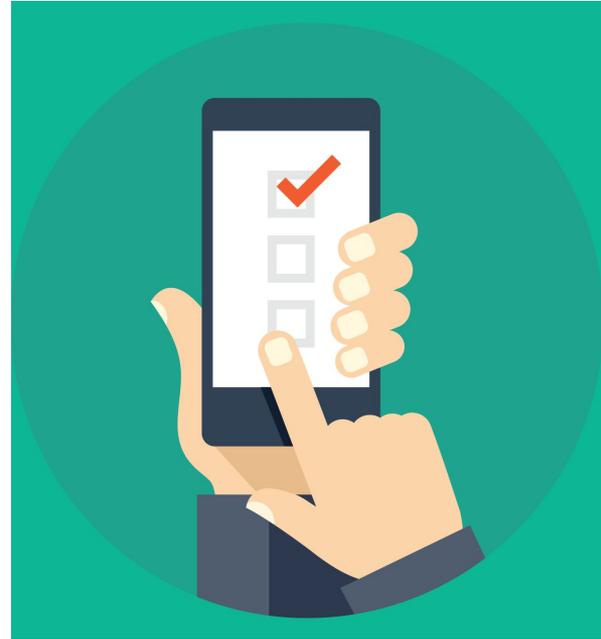
# #3: Short

- Short surveys produce higher response rates
- Should take fewer than 5 minutes to complete
- Ideally fewer than 10 questions
  - Less if you include lots of open-ended questions



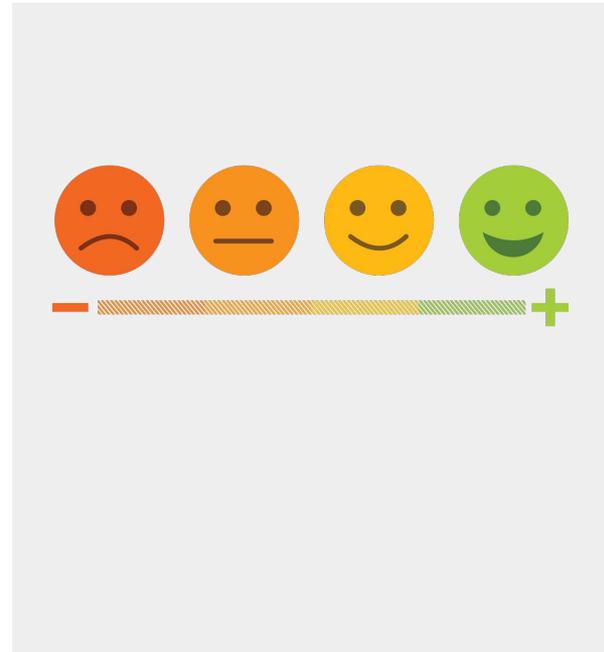
# #4: Delivered Well

- Intuitive and works on multiple browsers
- Mobile-friendly!
- Remove those who have completed a survey



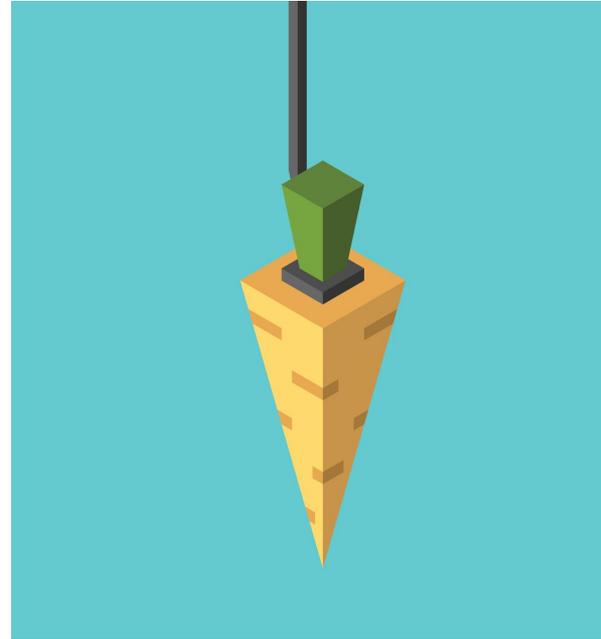
# #5: Tested

- Read the questions aloud
- Test over and over again
- Test with people who haven't seen it
- Test with people who aren't in your industry



# #6: Incentivized\*

- Consider an incentive for taking the survey
- Increase response by 5-20%
- Can bias results if too large
- Make sure the incentives are easy to allocate
- If user doesn't share their contact info, they can't get incentive



# How to Write Good Survey Questions



Closed questions are measurable.  
Open questions are revealing.

---



MIGHTY  
CITIZEN

# Closed Questions are Measurable

- Closed Questions
  - Provide list of acceptable responses
  - Multiple choice, Yes/No, Checklists, etc.
- Easier and less time-consuming on both ends
- Be careful not to bias



# Closed Questions are Measurable

On average, I access abc.org website \_\_\_\_\_.

- Daily
- Weekly
- Monthly
- A few times a year



# Closed Questions are Measurable

\* 26. With which gender identity do you identify? (Select one)  0

Cisgender Female (corresponds with birth sex)

Cisgender Male (corresponds with birth sex)

Transgender Female

Transgender Male

Gender Variant/Non-Conforming

Prefer Not to Answer

An option not listed here

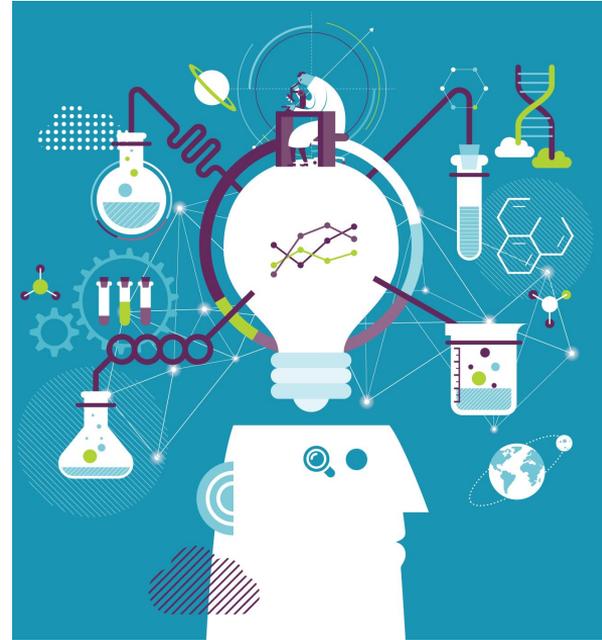


MIGHTY  
CITIZEN

---

# Open Questions are Revealing

- Allow respondents to answer in their own words
- Provide unanticipated insights and nuance
- Usually encourage more reflection (and accuracy!)
- Require more human time to analyze



# Open Questions are Revealing

## Examples:

“Why did you choose to become a member?”

“The most valuable part of my membership is:”

“<insert association>’s biggest opportunity for increasing its impact is:”



Should I ask closed questions,  
open questions, or both in my survey?

---



MIGHTY  
CITIZEN

# Just Don't

	Disagree										Agree
	- 1	2	3	4	5	6	7	8	9	- 10	
I felt that my interactions about my gift were appropriately personalized.	<input type="radio"/>										
I am satisfied with the acknowledgment or recognition that I received for my giving.	<input type="radio"/>										
I believe my gift has been used for the purpose for which I intended.	<input type="radio"/>										
I promptly received an accurate receipt documenting my gift.	<input type="radio"/>										
The process of making a gift was easy.	<input type="radio"/>										
I am satisfied with communications I have received about my gift.	<input type="radio"/>										
I understand the impact of my giving.	<input type="radio"/>										
They did a good job of asking me for my gift	<input type="radio"/>										



# Also Don't



**DoNotReply**

3:02 PM

**Tell us what you think!**

Dear Rachel, Thank you for joining us...



MIGHTY  
CITIZEN

# Pop Quiz!

*Asking two questions in one*

Question #1

What is the most affordable and most fun summer camp?



MIGHTY  
CITIZEN

Question #1

What is the most affordable summer camp?

*Make it two questions*

Question #2

What is the most fun summer camp?



Question #2

How much do you enjoy our <annual event>?

*Framing as a positive...*



MIGHTY  
CITIZEN

Question #2

What is your opinion of our <annual event>?

*Unbiased words*



MIGHTY  
CITIZEN

### Question #3

When were you born?

- a. Before 1950
- b. 1950-1960
- c. 1960-1970
- d. 1970-1980
- e. After 1980

*Not mutually  
exclusive options*



### Question #3

When were you born?

- a. Before 1950
- b. 1950-1959
- c. 1960-1969
- d. 1970-1980
- e. After 1980

*Only one answer  
applies*



Question #4

How often do you visit our website?

- a. Never
- b. Sometimes
- c. Regularly
- d. Often

*Vague!*



Question #4

Which option best describes how often you visit our website?

- a. Never
- b. Few times per year
- c. Once per month
- d. Once per week
- e. Almost daily

*Concrete  
and  
specific*



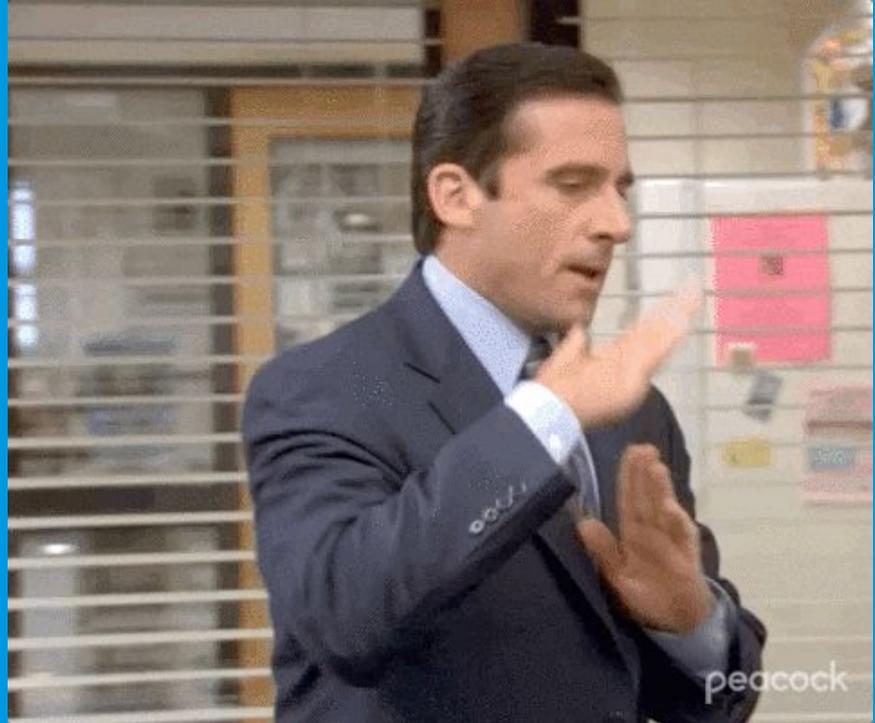
# Five Survey Analysis Techniques

MIGHTY



CITIZEN

Don't look at  
your data  
pre-maturely!



MIGHTY  
CITIZEN

# #1: Read All Responses for Patterns

- Especially with open-ended questions
- Read it multiple times
- Patterns will emerge
- Begin to name and group responses to a particular question
- Word Cloud





# #2: Be Careful with Averages

Cats are better than dogs.

1 • 2 • 3 • 4 • 5

(Disagree)

(Agree)

Five responses: 2, 3, 3, 4, 5

Average: 3.4

Five responses: 1, 1, 5, 5, 5

Average: 3.4



# Instead...

Show the number of responses for each option on a scale.

<b>1</b> <b>Disagree</b>	<b>2</b> <b>Somewhat</b> <b>Disagree</b>	<b>3</b> <b>Neutral</b>	<b>2</b> <b>Somewhat</b> <b>Agree</b>	<b>5</b> <b>Agree</b>
<b>0%</b>	<b>40%</b>	<b>0%</b>	<b>40%</b>	<b>20%</b>



# #3: Focus on the Big Picture

- It's easy to focus on the specifics and the outliers
- Instead, notice the big items
- If there are outliers or strange anomalies, dig deeper
- Be more skeptical of good news than bad news



# #4: Confirm, Then Change

- Surveys are just one of many research tools at your disposal
- You can conduct the same survey more than once
- Make changes in your organization once a clear picture emerges
- Start small with the change to make sure you're headed in the right direction



# #5: Report Back



# Recap



Surveys are trickier and more complicated than you might think.

**Conduct one only if you're willing to change based on what you learn.**

# Remember:

- Surveys are an inexpensive way to gather lots of data
  - For most, surveys are indicators, not 100% truth
  - Marry with other research methods
- Start your survey with a goal and a plan
- Good survey design is:
  - Purposeful, Targeted, Brief, Delivered Well, Incentivized, and Tested
- Write clear questions and provide context
- Read the results, avoid quick assumptions, and don't let the numbers fool you



# Research Kills Opinions



MIGHTY  
CITIZEN



*A 10-minute self-assessment to measure your organization's marketing maturity.*

**Get started at:**  
**[themightygps.com](https://themightygps.com)**

# The Mighty GPS

- An overall marketing maturity score and stage for your organization.
- Scores across six categories to identify areas of strength and opportunities for improvement.
- A customized report with next steps for each category to help you move into the next stage of marketing maturity.

# Questions?

Get the Slides and Survey Guide:

**[mightycitizen.com/surveys](https://mightycitizen.com/surveys)**

Sign up for insights, tools and trainings:

**[mightycitizen.com/insights-subscribe](https://mightycitizen.com/insights-subscribe)**

# Thank you!



**Brianna Martin, Director of Brand Marketing**  
**[bmartin@mightycitizen.com](mailto:bmartin@mightycitizen.com)**