

# Improving a Questionnaire

By Alex Hiam

One of the things I'm asked to do most often is to look at someone's survey and offer suggestions for improvement. Marketers realize that a little extra care and editing up front makes all the difference in the validity, and therefore the value, of the results. I recommend the practice for your questionnaires, too.

If big money is at stake, then you, or your research firm should do a formal pretest of your survey by trying it out on a small sample of respondents, and then checking to see if they seem to understand the questions and if their answers seem to make sense.

But in many cases, the stakes aren't high enough for a formal review. Your feedback can be just as good by asking an assortment of friends, marketing people (who hopefully have some expertise in research), and a few customers, to take a look at the questionnaire. And don't forget to put on your own editor's hat and review the questionnaire with a critical eye.

Here are seven questions to ask when reviewing a survey:

## 1. Is the survey *appealing* to respondents?

The survey should be interesting or rewarding for the participants. A good topic, well-written instructions, easy, quick questions, and perhaps the inclusion of a sales promotion (coupon, entry form for a contest, etc.) can make the respondents' experience more pleasurable — and ensure a reasonably high response rate. Too many surveys are confusing and lengthy. Cull everything but the vital questions and make those questions easy and interesting. (And make sure that your *list* — the people you contact and ask to participate in the survey — is good; pre-qualify respondents if possible. No survey is appealing to the wrong respondent.)

## 2. Do any questions *combine* more than one concept?

If so, break them apart. For example, I recommend breaking the following question from an employee survey by a garden and gift store into multiple separate items: "How do you rank the variety of our plant and gift selections? 1 2 3 4 (1 = meager, 4 = complete)." The simplest fix is just to offer two questions, one for plants and one for gifts. An even better way to handle it, because a number of major plant categories exist, is to break the question out like this:

### How do you rank the variety of our plant selections?

	Meager			Excellent
Herbs	1	2	3	4
Annuals	1	2	3	4
Hanging Baskets	1	2	3	4
Perennials	1	2	3	4
Bulbs	1	2	3	4
Christmas Trees	1	2	3	4

In fact, Annie's Garden & Gift Store in Amherst, Massachusetts used this very question in a customer survey, and the results helped store management decide which product lines to extend. A more general form of the question would not have given them the specific feedback needed to make their next year's buying decisions.

### 3. Do scales permit a *full range of answers*?

Sometimes the author's assumptions limit the respondent's options. Expand the possibilities and also use "Other: \_\_\_\_\_" whenever possible.

If you are using numerical scales, such as the 1 to 4 scale in Question 2, ask yourself what the pros and cons of a longer or shorter scale would be. For example, would a 5-point scale have any advantages over the 4-point scale? One obvious difference is that the 5-point scale permits respondents to give a neutral answer. This difference is important when you have an agree/disagree scale, as some people will want to fence-sit. Although you may not want neutral answers, you may want to permit them if respondents are determined to give them.

By the way, survey research firms generally use a 5-point or 7-point scale, and I recommend you do the same. More choices don't really slow down respondents. Once they understand a scale, they can use it pretty quickly — as long as the scale doesn't change from question to question. And the longer 1 to 7 scale should give you a finer measure of respondent opinions, because it breaks out the range into more categories.

### 4. Are any questions *leading or misleading*?

Check that questions are as clear and neutral as possible in their wording.

For example, the question "Do you agree that our customer service is excellent? Yes \_\_\_ No \_\_\_" isn't worth the ink needed to print it. First, the question is biased toward positive answers because of its use of the words "agree" and "excellent" within the question itself. (People tend to tell you what you ask them to tell you in questionnaires, so make sure that you don't give them obvious hints!) Second, respondents may be confused about where to put their check marks. Is a "No" answer indicated with a check before or after the No? Here is a rewrite of the question that solves these two problems:

**Please evaluate customer service:**

Terrible Excellent  
1            2            3            4            5            6    7

(Also see the section on measuring customer service in *Marketing for Dummies* 2<sup>nd</sup> edition)

### 5. Are any questions *irrelevant to your actions*?

Cut questions unless they help improve an important decision or process.

Most questionnaires are at least 75 percent waste questions. Really! Here's how I know. Actions do not result from most of the questions after managers examine the results. And if the result doesn't produce action, then the question was an obvious waste of everybody's time. For example, Annie's Garden and Gift store has no need to ask the following questions on its questionnaire:

1. **Are you:** \_\_\_ male \_\_\_ female

2. **Do you visit Annie's**

- \_\_\_ on your own
- \_\_\_ with a partner
- \_\_\_ with children
- \_\_\_ with friends

3. **Would you come back to Annie's to shop again?** \_\_\_yes \_\_\_no

The first question is probably included for the sake of tradition. Don't all surveys gather demographic data on respondents? But the tradition comes from large-scale, random-sample surveys in which researchers expect that men and women, or people of different ages, or companies in different industries, will give significantly different answers. Researchers use such questions when they anticipate a need to segment their respondents and analyze each group separately. They will cross-tabulate all the other questions by these demographic variables and look for statistically significant differences. And then they will customize marketing to each segment.

But Annie's — and, in all likelihood, you — won't. Small sample sizes and informal sampling methods (like handing out a survey at the counter) make that sort of statistical analysis impossible — even if the results would mean anything, which I doubt they would.

The third question seems much more useful. After all, return business is very important, so why not ask customers if they intend to come back to the store? But this particular survey's instructions say "Complete and return by the end of the month and get \$5 off your next purchase of \$20 or more!" Therefore, we can assume many respondents will take this survey home in their shopping bags and return the survey only if they, too, return. Most "no" answers will never make it back to the store to be analyzed.

## **6. Are any questions better determined through observation?**

The other category of unnecessary questions elicits answers you do need — but could more easily obtain through observation.

Assume for a moment that Annie's *does* have an important need for data on the gender of its customers, with whom they shop, and whether and how often they return. All of this information is easier to obtain through simple observation of who comes into the store (and in what groups), and through use of secondary sources such as the store's credit card records. An employee can fill in an observation form to record information about the people who come into the store.

And an evening with the old credit card records can tell you what percentage of customers who paid by credit card were repeat customers in a given period, and how often they returned. Of course, this source leaves out all check and cash customers, so you may want to start collecting customer names at the register. Many stores do already, either through a computerized cash register system or through a sign-up to receive a newsletter or the like.

An observer can measure another important aspect of customer behavior better than a survey can: How many customers come into the store, look around, but don't find what they want? Every retail store has some of these — and they are often the biggest percentage of shoppers. A survey given out at the register misses these consumers. If the survey was given out at the door, most would still be missed because dissatisfied customers rarely volunteer to fill in surveys.

Yet observation can tell you a great deal about these lost customers at low cost. An employee can count them in a random selection of fifteen-minute periods, allowing you to estimate the number of them per day or week. (To learn more, you could also have an employee intercept some of them and ask them what they were looking for and why they are leaving.)

I strongly recommend collecting observational data on both the *rate of repeat business* and the *number of lost customers*. Both statistics are

manageable, meaning that once you measure them regularly you can experiment with changes and then see if the measures move in a favorable direction. And both are typically best measured through observations rather than questionnaires.

**7. Does your questionnaire allow respondents to *tell you something you don't know*?**

This question, the last of my recommended ones, is the most subtle. Many questionnaires are well constructed and get useful information — yet fail to reveal a critical fact, because the author didn't know to ask about it.

For example, what if customers like to visit Annie's Gift Store during their lunch hours and wish they could bring or buy a sandwich and eat it in the garden during good weather? Annie's included a number of open-ended questions and a blank page to give respondents a chance to tell them something like that. My favorite of the open-ended questions in their survey is "If you had a garden store, what would you do differently?" This question is designed to get the respondent's imagination going and is likely to generate the sort of creative suggestions that more structured questions cannot.