

Surveying the World

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This article discusses considerations for conducting surveys and identifies the roles a technical writer may play.

Surveys are popular tools used to assess a condition, opinion, situation, or held value. They come in many forms, such as online and paper questionnaires, in-person interviews, focus groups, telephone, and mail. Sometimes, a technical writer will be asked to get involved in a conducting a survey either in-house or for an external customer. This article discusses issues associated with doing online and paper benchmark surveys (which monitor the progress of something or compare data within an industry) and provides basic information on the roles that a technical communicator may play. The word “client” refers to both in-house and external individuals.

Once you’ve committed to doing an online (Web-based) survey, you must think about the tool you will use. Here are some considerations.

- If you’re going the Web route, get your IT and purchasing groups involved up front in selecting software. You won’t want to have something installed that isn’t acceptable to either of them.
- Decide whether you want the Web survey hosted on the vendor’s site or your site? There are pros and cons with either way of hosting. For instance, what happens to your surveys if the vendor goes out of

business? Do you want the vendor to have access to your data (which may be proprietary), which they will if the survey is hosted on their site? Are they located in a disaster-prone area? If you’re considering hosting it on the company’s site, do you have the resources available to do the work?

- Do you want do develop, control, and administer the survey, or do you want the vendor to do it for a fee? The answer to this can depend upon how many surveys you plan to do and what your staffing and budget resources are.

What type of software do you need? The many vendors exist and have different approaches, strengths, and weaknesses. Do your homework. Ask questions such as:

- Do they offer open architecture?
- What languages can they handle?
- Can you get a multiple-person license so that co-workers can access your survey in case of vacations or illness?
- With whom does the vendor do business? How long has the vendor been in business? What types of organizations (large, small, government, corporate, etc.) have used their software? What type of support do they

- offer? Ask for a list of clients and find out.
- How many surveys are you going to do? Some software is best for the “casual” survey. Other are better for “industrial strength” multiple surveys.
 - What is their fee structure? Some systems offer a flat yearly rate, with no additional costs. Other firms make their money on the number of surveys and/or the number of responses. It can be hard to negotiate a price if you don’t know how many surveys you’re going to do in a year or how many responses you’ll get.
 - Is there is a limit on the number of responses per survey. For instance, if the cut-off is 100,000, this may affect your ability to do the survey adequately.
 - Is there a survey set-up charge? Some software vendors can charge \$8 per question, or even more (\$35) for skips and branching, e.g., the type of question that reads, “If the answer is no, please go to question X.”
 - What happens if the survey has to be changed, i.e., deviates from the contract specification? How much will that cost? Some charges can range from \$200 to \$350 per hour.
 - Does the vendor handle paper surveys? Some software vendors don’t address the paper issue; you might have to.
 - Does the software have a limit on how many people can access the survey at one time? For instance, if the cut-off is 50, and the 51st person logs on and gets a “Please try back again” message, is that

acceptable? Do you think the person will try again? What happens if there are repeated attempts and the same message is received?

Paper-based Response

Remember that some clients may survey throughout their organization, including the factory, where computers are not always used. A computer kiosk can be set up, but sometimes paper is still the only option, especially if your software doesn’t handle certain languages.

You might consider scanning software and a scanner that will import the data and merge it with the data you’ve received from the Web. You’ll have to do a cost-benefit comparison to see if it’s worth it. There are also firms that do optical scanning for a living.

Decide how you are going to handle paper-based written comments.

Technical Communicator Survey Roles

The survey roles, in general, are developer, manager, and data analyst. The developer designs the survey, the manager does all the upfront activities required to launch the survey, and the data analyst works with the data downloaded from the survey and prepares the graphs and presentations according to pre-determined guidelines. As a technical communicator, you may do one or all three roles.

Survey Developer Tasks

The survey developer would generally work with subject matter experts to design the survey and develop questions and responses, that are determined by the objective set for the survey. However, you may also have do develop

one yourself. The principles of good technical writing will serve you well. For example, define the objective, and make sure that every question refers to the objective. Like many aspects of technical writing, writing questions requires skill. To make them effective, make sure you think them through, because incorrectly worded questions could result in bad data. If this happens, not only was the objective of the survey not achieved, but a bad decision could be made based on the bad data.

In general, surveys should be short, and the individual questions definitely should be. If this is a benchmarking survey, remember that further surveys will be based on the results of this survey, so factor this into the design – once it's done, it's done. The questions should be in logical groups, each question or section building on the previous one. Ask the prime questions first. Save the demographic questions for the end. Keep one thought for each question; that is, do not combine two questions into one.

If you are working with an external client, make sure that wording of survey will be understood by respondents. For example, do they use “hourly” and “professional” as standard terms or do they use something else such as “non-exempt” or “exempt”? It is important to get this correct, especially when dealing with international clients and translations.

Manager Tasks

As the survey manager, you must work with the client and review the number of surveys expected, method of collection, timeline/calendar, status reports, contingency plans if responses come in slowly, contact information, etc. Make sure you know the level of approval

needed before the survey can be sent out to the organization. Identify by which groups/sites the client wants to collect data. Your smallest groups should be greater than 50 to ensure anonymity. Identify how the data are to be parsed. You don't want the client to expect 30 data cuts when you planned (and are staffed) for only ten. Make sure you are surveying enough people to make it worthwhile. From the client's point of view, do you have enough samples to get a statistically viable result? The larger your sample, the more reliable your results will be.

Avoid customizing. The order of the questions should stay fixed in order to simplify data entry (and later benchmarking work) and to eliminate the chance of errors. Any change of the question content could void the ability to compare the survey response to the benchmark data.

If it's a Web-based survey, enter the survey into the Web survey tool if you or someone from your office is going to do it, or have the software vendor do it. Create the Web survey link or a test email, depending on your software. Do this as well for the translated versions of the survey. Send the link(s)/email to the client so they can “test drive” the Web survey. Clear out the test data prior to the survey launch. Be sure the client tries the link(s)/email in all the regions that will take the survey to be sure everything works reliably.

Develop a leadership letter template and use it to create unique written communication that will accompany surveys as they are distributed throughout the organization via electronic or paper means. This would be the letter that everyone gets when the survey is launched. Have the

client further customize this letter and approve it through their process. Customize an FAQ document for use by site management and supervision explaining common questions.

You'll have to confirm launch date and printing deadlines with responsible parties. Open the Web survey prior to launch date with all the "test drive" data cleared. Discuss with the client the plan regarding whether any surveys will be "thrown out" and for what reason. Develop a strategy for this prior to the data processing step.

You'll have to identify personnel on-site to be part of a distribution/collection/entry team and contact them, explaining the importance of their participation and their responsibility. If paper surveys are going to be used and if the client resources will be used to enter the data, do training. About a week before the launch of the survey, supply client with the electronic files (e.g., Excel, Access) that the data needs to be entered into. Establish a cut-off date for receipt of all paper surveys. If you are going the paper route, establish a method (fax, mail) for all paper copies to be returned to you.

During the survey's open period, monitor the response rate. Communicate with the client if needed about slow or low response rates. Develop a plan with the client to address these issues. Additionally, be sure to back-up the data occasionally during the survey period by downloading the results-to-date, just in case the system crashes and the data get lost.

Data Analysis Tasks

There are many ways to work with the data, and the method is determined by the type of survey software package.

Many software packages enable you to download results into Excel or Access. You may have to work with someone to get the templates set up ahead of time, but once they're done, the work is fairly routine. A software vendor also may have a different, easier, and proprietary way of working with data. You should provide the final survey response rate data, after agreed-upon closing date.

Surveys are normally left open for several days after the communicated close date, as this gives a better impression to late responders compared to being locked out. The survey statistics are normally unaffected by missing a few responses.

After the survey closes, you should confirm with the client that the data are final. In general, do not give the client company the data files unless this is stipulated in the contract. Data may need to be scrubbed to prevent the possibility of identifying individual survey responses, especially by upper management, due to the low number of responses. Once this is done, you can prepare reports that can be presented to the client.

Surveys are a good way to collect information, and properly prepared can achieve important goals. Doing international surveys complicates things, but makes it more interesting. And it's always good to hear what other people think.

International

There are many things to consider; and if it's an international survey, things can get quite complicated.

- Some can handle only Latin-based fonts. If you need Asian, Cyrillic, or Hebrew/Arabic, that may narrow your choice. If the vendor can't handle certain languages, an option

is to offer paper surveys for them. This is expensive, because each paper survey must be handled individually, scanned, or have the data entered manually, and then have the data merged with that of the Web survey.

- Can the computer screen be modified to accommodate languages that read from right to left (Hebrew/Arabic)? Can you do it, or must the vendor do it? What do they charge?
- Can your translators use MS Word files to create multiple-language versions of the survey and then send them to you or the vendor, or will your translators have to use a vendor utility to create the files? Most translators will not want to learn a new software package.
- People on the factory floor may write in a language such as Malay, Pilipino, or Flemish. You must make arrangements to have them processed (either by the client or you) and translated into English or another language for a presentation.
- If translations are needed, get this started after the text is firm! Patchwork translations are an inefficient and expensive way to operate. Don't rush the translator or quality will be affected. Always use a professional translator, not someone from the office who speaks the language. If you ask someone who has another job to do the translation, you're liable to miss the deadline because translation isn't the person's prime responsibility. Once you get the translation, send it to someone in the region (either from the customer or your organization) and confirm that the survey text is correct. Although the translation may be excellent, there are subtle

local nuances that can affect the interpretation of the questions.

- If you are going to use paper copies, send this in the correct format. European documents will have to be in A4, for instance.
- Customize an FAQ document for use by site management and supervision explaining common questions. Have it translated as necessary.

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