Do Your Research
Survey With Purpose

Why do you survey?

☐ Understand Trends .................. 38
☐ Use data ................................. 26
☐ Hope for the best ..................... 18
☐ Follow my gut .......................... 12
☐ Other ................................. 6
Why don’t associations regularly survey?

- Associations know what members think
- Only the unhappy will answer / or the happy ones
- Don’t have the time analyze
- Don’t know how
- Board members “know it all”

Most times, we don’t see the world as it is… We see the world as we are.

- Anais Nin
There is one group of people that can tell you if you are on track, if you deliver value, and give you honest feedback. It's your members.

“You can’t connect the dots looking forward; you can only connect them looking backwards. So you have to trust that the dots will somehow connect in your future. You have to trust in something — your gut, destiny, life, karma, whatever.”

- Steve Jobs
The Best Payoff

An intentional Approach

Get the Best Possible Return on Your Research Investment

1. Choose two important member groups
2. Decide your end-game and Plan
3. Know the right questions - and not
4. Encourage confidential feedback
5. Use, share and track feedback

1. Targeting - Why Segmentation Matters

Prioritize Who You Serve

Steps to Segmentation

All Members
Committed full-time to the business
We can’t reach our vision without them
We can influence their success with what we do very well

Target Groups
2. Plan for your End-Game

*Unintended Consequences?*

*Agree on WHY?*

*What will measurements tell you?*

*Compare to something?*

*Your audience’s tolerance*

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**The End Game: Progress on BIG Goals**

1. Identify any gains / losses
2. Refine our focus
3. Verify value message is still relevant
4. Validate by segment

“The survey is part of our effort to improve and measure the value we deliver to our members.”

KG, State Association CEO
2. Plan for your End-Game

Biggest Myths:

- Large membership = higher repose rate needed
- Only satisfied members answer surveys
- We can’t get a valid sampling through email

Plan For a Realistic Response:

<table>
<thead>
<tr>
<th></th>
<th>500</th>
<th>2,500</th>
<th>8,500</th>
</tr>
</thead>
<tbody>
<tr>
<td>Confidence Level</td>
<td>95%</td>
<td>95%</td>
<td>95%</td>
</tr>
<tr>
<td>Margin of Error</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Response rate</td>
<td>217 (43%)</td>
<td>333 (13%)</td>
<td>368 (4%)</td>
</tr>
</tbody>
</table>
### 3. The Knows and the NOs

<table>
<thead>
<tr>
<th>What To Do</th>
<th>What Not To Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Use non-judgmental wording and neutral terms.</td>
<td>1. Do not ask leading questions.</td>
</tr>
<tr>
<td>2. Ask overall satisfaction questions.</td>
<td>2. Avoid word choice confusion</td>
</tr>
<tr>
<td>3. Offer an &quot;out&quot; for questions that don't apply.</td>
<td>3. Avoid &quot;double-barreled questions&quot;</td>
</tr>
<tr>
<td>4. Limit the number of ranking Qs.</td>
<td>4. Avoid industry jargon and acronyms.</td>
</tr>
<tr>
<td>5. Mix up your questions.</td>
<td>5. Don’t ask questions your can find the answer to yourself.</td>
</tr>
</tbody>
</table>
### Demographic
- % Full Time
- Age
- Tenure
- Production per year
- Geography
- Position type

### Rating
- Overall how satisfied are you with:
  - Very Satisfied
  - Satisfied
  - Neutral
  - Not Satisfied
  - Very Dissatisfied

### Y/N Response
- Write In

### Ranking
- YTA stands for something important in our industry
  - Strongly Agree
  - ...  

### What industry issues are most on your mind right now?
- Uncertainty in the industry
- Economic Uncertainty
- Doing business safely (risk reduction)
- Regulatory threats to our industry

### If you could send a message to our Board of Directors, what would you tell them?
- % Full Time
- Age
- Tenure
- Production per year
- Geography
- Position type

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**Verbatims**

“OMG, yes!
It is amazing the little things that irritate or hamper members’ productivity and if we only knew what those little things, we could remove an obstacle.

One year I found a comment, “It would be so nice if you would date your messages on the MLS message of the day – then I know if the message was something new I had missed and whether or not I need to read it.”

This was fixed the very next day.

MR, Local Association CEO
Courageous Questions

☐ XAR has made changes for the better in the past 12 months. YES or NO
☐ If X was not part of the XAR’s offering, I would still find value in my membership. YES or NO
☐ If I weren’t a member, I would be willing to pay for a subscription to receive your newsletter. YES or NO

Making Big Change

It is critical that we hear all the news - good and bad!
If we want to stay relevant we continue to search for quality improvement and slight changes in the outside practice environment and adjust accordingly, or soon we become irrelevant to the member.
When I know the bad about what’s going on out there and inside the organization, I can analyze it and determine the best course of action, if any.

DK, Local Association CEO
4. How to Get Them to Participate

- Confidential
- Say What You’ll Do
- Don’t Waste Their Time
- What’s In It For Them?
- Make it Stand Out To Get Their Attention
- Be Authentic

When promoting your survey, remember:

1. Articles with images get 94% more views
2. Viewers retain 10% of what they read and 58% of what they see
3. Using videos on landing pages can increase conversions by 86%
4. Videos get 267% more links than normal blog posts
5. 20% of people will read copy while 80% of people will watch a video with the same exact content
6. 58% of your audience will stop watching a video within the first 90 seconds
5. Use, Share, Track

Review Internally

• Statistics
• Compare
• Get Staff Involved:
  - 5 Observations
  - 5 Surprises
  - One short term and 1 long term action
• Prove you listened - statistics or a chart, or a finding
An Executive’s Feedback

- “Survey was motivating to the staff
- Energy and increased team synergy
- Sets unspoken benchmark for customer service attitude and behavior
- There is a challenge in results”
I Did My Research
bit.ly/silverplaybookvideo

Summary of this talk:
bit.ly/nsm_7surveyquestions

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