

The CEO Refresher

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Survey Strategies and Solutions

by Shirley Frazier

A survey is like a compass. In business terms, it plots a route for a company in the direction it's most likely to succeed.

Developing a client survey is a focused approach to understanding how clients view your products and services. It also channels your decisions as to what will be offered in the future.

Many firms prepare surveys with the help of outside consultants, but this isn't always the best option. If you're ready to go this alone, here are five points to steer your company toward developing an insightful survey.

1. **Chart the course.** What information will you collect? Your survey questions depend on the company's strategy, industry and/or economic changes, decrease in market share, Web site re-launch plans, or a host of other reasons. Decide what critical information is needed from your clients. Then prepare uncomplicated questions that focus on your goals.
2. **Plan your objective.** Prepare no more than 12 questions which can be distributed by mail or on a Web site page with a URL that's circulated by postcard or Email. Clients will view the survey and immediately decide if they'll participate. If it reminds them of a college entrance test, the response rate will drop considerably. Be sure to inform clients how long the survey will take to complete (5 minutes, etc.).

After each question, list the three to five most-relevant answers, one under the other, with a check box placed to the left of each response. Make the last entry a blank line for a written response when preceding answers are irrelevant. Indicate if one answer is appropriate or if more than one response is permitted (example: "check one" vs. "check all that apply").

3. **Set sail for home.** End the survey with questions that compile basic statistics such as company type (industry), company size (number of employees), and responder's position (CEO, CFO, etc.). You'll use this information for future efforts to design a marketing campaign to reach similar companies who need your products or services.
4. **Stay on time.** Give a deadline date to heighten the sense of urgency. Just as you would write, "I'll contact you on Tuesday," in a marketing letter, tell clients when the survey must be returned. No deadline date results in surveys drifting into port years later.
5. **Reveal the treasure.** Offer a worthwhile incentive in the survey's introductory text to increase the response rate. If inexpensive pens and calculators don't move you to action,

why would they entice your clients? Distribute prepaid rental movie coupons or have a drawing for a weekend at a spa. Remember to request each client's name and address within the basic statistics' section for incentive distribution.

Software products exist in the marketplace to calculate the responses and help you decide what marketing strategies are working and which should be revamped or discarded.

Query your clients every two to three years. Their revealing information will aid you to develop new ideas which become your ultimate road map, steering your company safely into clear waters and higher sales.

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