



Leveling up **your DIY powers**

A guidebook for better survey design

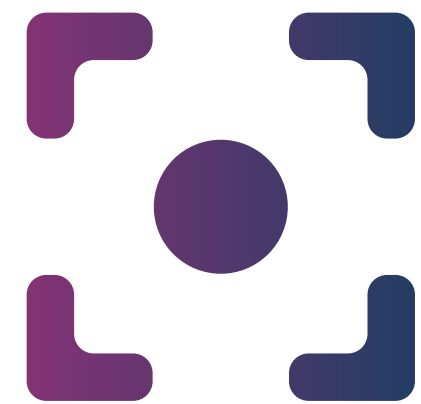
Embrace the opportunity

Looking to level up your DIY powers? It all starts with understanding the incredible potential behind designing your own surveys. This guidebook was created to help you gain confidence as you build. Can you feel the power? Can you sense the opportunity? Let's harness it!



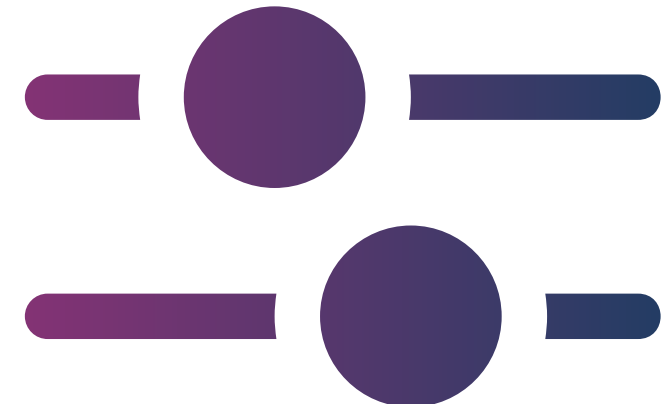
Embrace the opportunity

The four stages of great survey design



Focusing

Take a breath, find the inspiration driving your survey, and hone in on it.



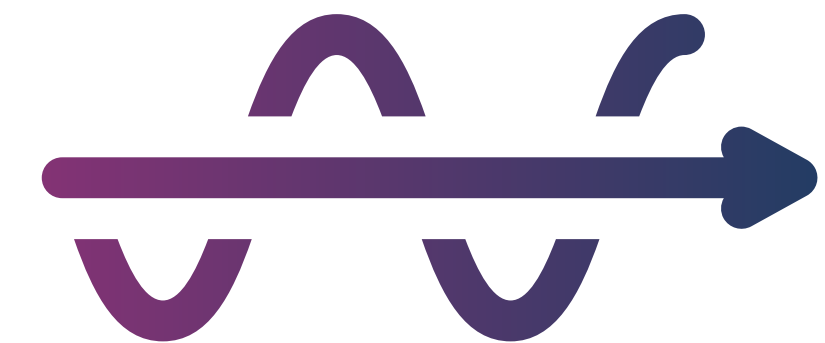
Designing

Harness your curiosity to build questions with context, clarity, and consistency.



Mapping

Create a survey route that engages your audience and evokes strong responses.



Streamlining

Empathize, review, and strive for a survey journey that feels simple and enjoyable.



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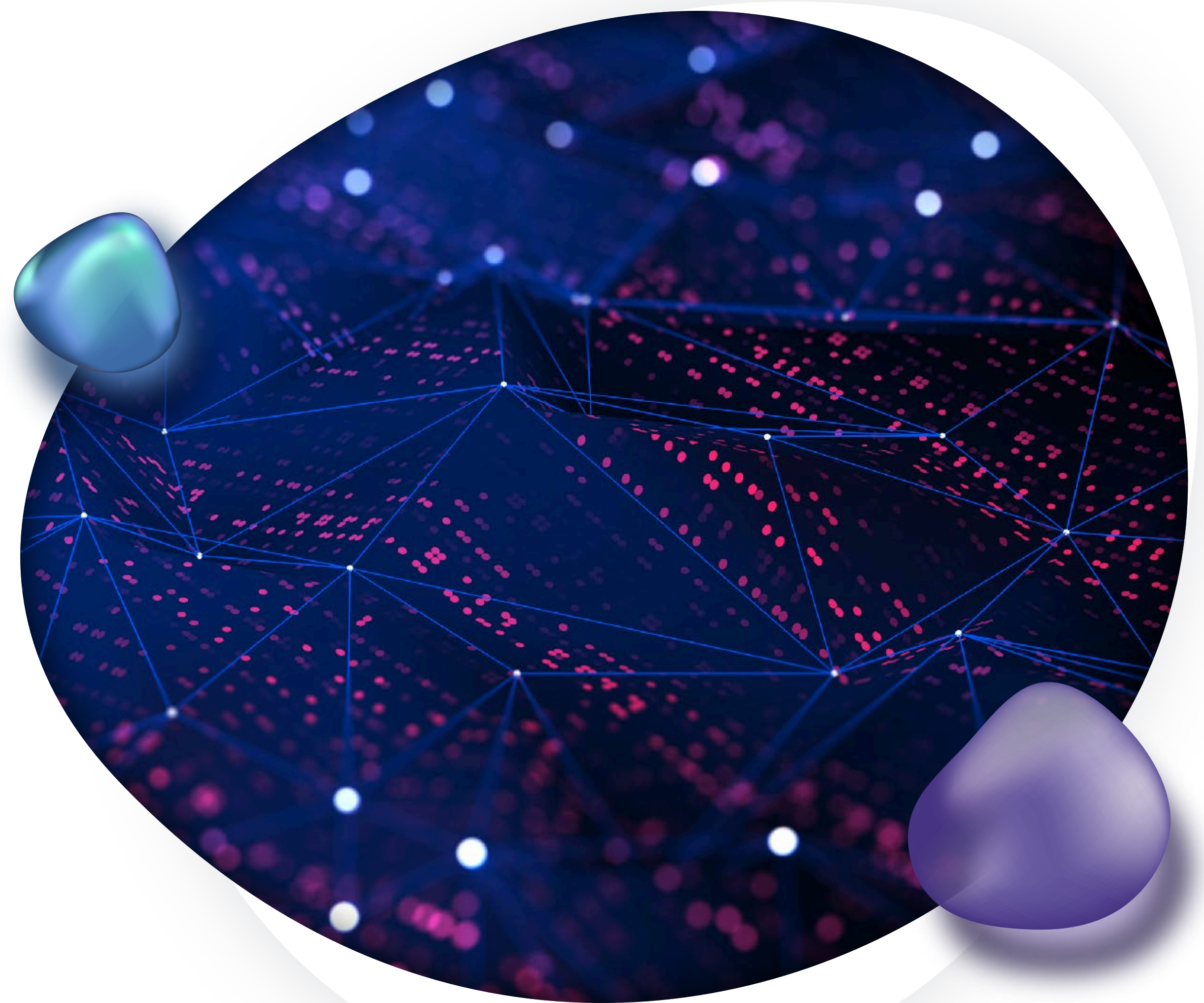


Find clarity in “the big why”

Center your thoughts around “the big why” that’s driving your survey. Allow yourself to become inspired by it. Let your curiosity propel your vision forward.

Ask yourself why

- Why are you creating this survey?
- What business action are you trying to inform?
- What is the essential information your survey seeks to provide?
- What pieces of nice-to-have information are most important?
- Are you trying to fit too much into one survey?
- Where is the excess?



Build **with purpose**

Look ahead—all the way to the analysis portion of your survey. What do you need to do in order to get actionable results? Refer back to “the big why” to design a survey experience that drives meaningful insights.

When
**designing
questions**



Let “the big why” guide you

- Consider the analysis you’ll be doing at the end.
- Build a sturdy structure for your survey that will hold up to your analysis.

Align your questions with your analysis needs

- Contemplate question types that are most conducive for respondents
- Think about piping and the flow of your survey from big picture to small.

Empathize with your respondents

- Think of your survey as a conversation.
- Construct an experience that solves, rather than compounds, challenges.



Be “testably different”

You don't have the ability to read your respondents' body language. Anticipate where a further explanation is necessary and communicate in a way that's most understandable.



Recognize you think about your product and category for many more hours—and in much more detail—than people who don't work in your field. Drop the industry jargon, expand the acronyms, and lose the lingo.



Understand that what seems new and different to you might seem quite subtle—or even unnoticeable—to them. Survey takers will absolutely answer your questions, but it's a missed opportunity if they're not sure what they're answering!



Reflect on the business action you need to drive and devote serious thinking to how you can ensure you're getting the information you need. Does this make sense to busy people living their lives?



Designing

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Let thoughtfulness **drive precision**

Respondents are doing their best to answer your questions efficiently, but the human brain ‘autopilots’ to spend its energy wisely. Be clear, give context, and stay consistent.

Tips for human-centric **survey design**

- Give signals to help respondents understand what to focus on, how to respond, and where the survey is headed.
- Provide the information needed to promote certainty in responses.
- Allow your respondents to see themselves in the response options.
- Use scales and open-ended responses in ways that promote confident responses.
- Be thoughtful about timeframes and attention spans—don’t hesitate to funnel from longer times to shorter ones.



Strive for **clarity and consistency**

Prioritize how you can put everything on an even playing field for your respondents. This can apply to the language you use, how your scales are represented, or the stimuli you incorporate in your questions.

How to achieve “**apples to apples**” comparisons

- Ensure your options contain the same level of information—don’t mix well-detailed concepts with basic product descriptions.
- Use similar levels of illustration—don’t pair a napkin sketch with a 3D rendering.
- Be sure concepts and ideas are built on the same chassis and in the same format.
- Use consistent font type, size, and characteristics (bolding, italics, underling).
- Ensure the images you use are in the resolution—preferably higher than lower.



Be exhaustive, not exhausting

Empower your respondents to answer with certainty. Well-constructed options can help your respondents find their place among the available choices.

3 considerations for **comprehensive response options**

1

2

3

Often, companies think of direct competitors first, but respondents think of a challenger brand or a poetic outsider instead. Don't go to great lengths to list every brand as an option—give them a chance to say, "I use something else."

Pay close attention to how you end your questions. Sometimes, there's a strategic advantage to giving a "none of the above" option. But when you're asking respondents for items that aren't on the list, you may want to use "other" and have them list.

You can use piping or question logic to make the experience easier on respondents. If a question feels particularly exhausting, try dividing it into multiple parts.



Stick the **landing**

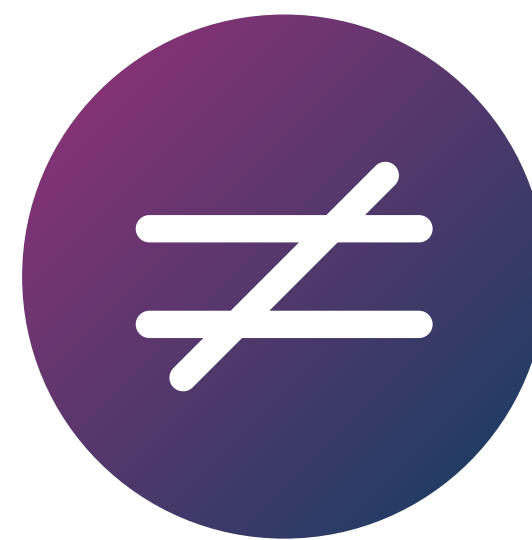
Familiarize yourself with the appropriate different final response choices. For instance, when “none of the above” is chosen on the aytm platform, all other choices become unclickable?

Definitions for **common final response choices**



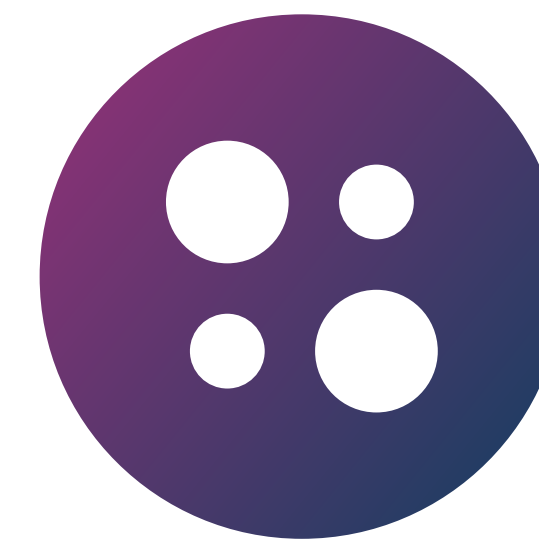
None

The explicit options provided don't cover their answer.



N/A

None of the options apply because the question itself may not apply.



Other

Use this option to capture lower incidence. To understand their response more precisely, include an open-ended probe, and be thoughtful about whether to make it optional or not.



Mapping

Create a survey route that engages your audience and evokes strong responses.

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Be thoughtful about the flow

Imagine your survey as a real-world conversation. Consider how it begins, builds, breaks, picks back up, and ends. Create a conversation that feels engaging and effective, not awkward and noseey.

3 tips for **constructive conversations with respondents**

1

Start with simple, basic questions to build rapport, then gracefully build towards more profound and pressing topics.

2

Try not to save the biggest and most challenging questions for last. Place more fatiguing tasks like MaxDiff, Conjoint, and evaluations earlier in the survey, if possible.

3

Move anything that isn't needed for screening or setting up more complex questions to the end, or to places where a break could be helpful.



Help them know the path



Guide your respondents along the way. Let them know where they're at, how much is left, and what to expect next. This will help make sure they don't get fatigued and drop off.

Best practices for signaling your respondents

- Tell respondents about the survey experience they're about to have.
- Set expectations for the route and give them guideposts as they travel it.
- Let them know what to expect at the outset of the survey.
- Signal them often to set expectations as they progress through the route.
- Group questions together so they can take any opportunities for meaningful breaks.
- Help them understand how much is left—especially with repetitive tasks.



Plan to **ask & listen** efficiently

Planning isn't all about respondent experience. It's also a huge part of making things easier for you as well. The right planning can help you focus on getting the data you're looking for while keeping response quality high. It's also a significant part of making things easier for you as well.

Tips for effective question planning

- Prioritize the meaningful questions first—especially the open-ended ones.
- Use logic to keep the number of questions down for any given respondent by using the principle of “reduce by relevance.”
- If you see strong top 2 box scores, use logic to focus on the likes; if you see more on the bottom two, focus on what could be different, changed, or improved.
- Minimize ‘N/A’ scenarios—hundreds of open-ends full of ‘None,’ ‘N/A’ and ‘Nothing’ aren't always helpful.
- Consider reducing questions randomly when you need to probe more deeply—it can help balance your workload by probing just a few areas per respondent.



Use quotas **wisely**

Have a clear point of view on your sample. Take time to think about incidence and frequency, consider your expectations for respondent drop-out, and add quotas where you need them.



Be careful not to over-engineer the sample unfairly with quotas. Use quotas thoughtfully and sparingly.

If you set quotas on a question, place it the same way you'd place a standard screening question.

If you need to cut your data in certain ways, make sure you have a robust amount to work with.

If you need a significant amount of a certain group, build it into the quotas upfront. If you're unsure how to do that, let us know—we can help!



Streamlining

Empathize, review, and strive for a survey journey that feels simple and enjoyable.

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Use show/hide **logic**

Simplify the survey path for your respondents by leveraging show/hide logic. You can do this with any information you already have: Answers to previous questions, demographic traits, etc. This will help respondents focus on the most relevant questions and answers.

Sound survey Logic for the double win

- It's a win for the respondents because it removes unnecessary repetition and provides an efficient, entirely relevant experience.
- It's also a win for researchers because it avoids situations where irrelevant answers may dilute a vital question or provide conflicting information.



Check respondent fit with compassion

Always build in attention checks, but recognize that real humans make real mistakes. Focus any “trap” questions on identifying people who are clearly not participating honestly.

Tips for **building efficient checks**

- Understand that clear, standalone attention checks are more reasonable than a grid row buried in a list of 15 items.
- Remember that with grid questions, you’re asking respondents to lock into a higher-level mindset for answering—so it may not be the best time to test attention.
- When it comes to removing respondents, it’s a more fair and well-rounded approach to set a threshold for multiple failures as grounds for removal.
- Recognize that being overly strict can inadvertently bias data.



Recognize their reality

Respect the differences between you and your respondents. You have a highly nuanced understanding of the subject matter; they just shop for the things they need and move on.

Check **yourself**



Pull yourself out of the depths of your brand.



Start at the bigger brand level and then dial in.



Get them thinking about sub-brands or benefits first.



Watch out for technical lingo.



Add visuals to your survey—it helps.



Take a walk **in their shoes**

Take the survey yourself. Try it from multiple angles and consider getting another set of eyes on it before you launch. Some honest feedback from a colleague could go a long way.

Before you **launch**:

Prioritize time to test.

1

Check for flipped progressive matrix grids.

2

Check for missing answer options.

3

Pressure test points where you built-in logic.

4

Look for typos, extra formatting, items mistakenly copied from external documents, etc.

5



Use your DIY powers **for good**

With great power comes great agility. Hone your
DIY skills with these helpful tips.

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Top DIY mistakes

Mistakes happen. And lots of times, mistakes are good—if you manage to learn from them. Here are the top 11 DIY mistakes. Have a look, and by the end of this guidebook, you'll learn exactly how to avoid every one last of them.

1. Too much detail beyond the respondent's expertise
2. Problematic scale usage
3. Suboptimal stimuli
4. Lack of clarity and relevant answer options
5. Sample definition and tracker mistakes
6. Not enough context to set the scene
7. Incorrect matrix programming
8. Too big a load
9. Not providing an optimized flow
10. Lack of testing before launch
11. Not checking attention the right way



Top DIY mistakes

Too much detail beyond the respondent's expertise

- **Don't get too technical.**
- Understand what resonates with users and work to help them help you.
- Give respondents context about what it all means and help them see the potential.
- Putting too much on them means you risk getting their best guess rather than their foundational understanding.
- Need is their high-level impression? Show technical claims in a product context, like with packaging.

Problematic usage of scale

- **Find your balance.**
- Make sure the default values and ranges remain consistent for repeated scales.
- Understand the different types of scales available.
- If you're comparing results to outside values, be sure to use the same increments.
- Check your semantics—will respondents understand the gap between the two extremes?



Top DIY mistakes

Suboptimal stimuli

- **Help them see it clearly.**
- Use higher-resolution graphics that allow consumers to really scroll in and explore.
- Understand that hard-to-see images can compound follow-up questions.
- Give respondents a way to zoom in on stimuli.
- Provide written descriptions to summarize and help bridge the gap.
- Advanced techniques offer a lot of analytical power, but when stimuli are too detailed, it makes the respondent's job too difficult.
- Minimize dead white space whenever possible, and use larger, bolder fonts.

Lack of clarity and relevant answer options

- **Be exhaustive, not exhausting.**
- For comparisons, create maximum readability by using all available screen space for content.
- For questions like MaxDif, use square formatting to maximize usable area.
- When comparing, strive for “apples to apples.”
- With ranking questions, be sure to offer a reasonable amount of options—ideally no more than seven.
- Make sure your answer choices provide an option for everyone, not just what options are needed for later analysis.
- Every question type has various settings that affect how a question is presented and how respondents can answer.
- If you want an "N/A" option* to be mutually exclusive, check the box on the platform.



Top DIY mistakes

Sample definition and tracker mistakes

- **Be intentional and systematic.**
- Be sure to create your sample to align with known population distributions.
- Plan for your data cuts!
- With trackers, it's even more important to minimize noise.
- If you're doing a tracking study over time, it's especially important to be consistent in all aspects.
- With trackers, make sure you manage respondent assumptions proactively and keep core content the same—including how you lead into key measures.
- Do your best to keep fielding conditions as similar as possible, including time of day when launched.

Not enough context to set the scene?

- **Be clear about your goal.**
- When asking about behaviors, be sure to frame the question fully.
- It's fine to cover different areas but try to build in transitions before abruptly switching topics.
- Group questions together to help respondents remain in the appropriate headspace.
- If this were a real conversation, is it one you'd want to be in?



Top DIY mistakes

Incorrect matrix programming

- **Check your progressive matrices.**
- Choose between a radio or a checkbox setting.
- Set your minimum and maximum value for checkboxes.
- Be sure your “N/A” options are exclusive to checkboxes.
- Consider the display orientation when checking option length.

Too big a load

- **Don't ask too much from your respondents.**
- Pull back, think about the big picture, and focus on the business action.
- Ask yourself if you're really going to use the data from all these questions.
- Consider making this into two surveys.
- Beware of letting your needs overwhelm respondents' ability to accurately playback the details.
- With repetitive tasks, try to highlight the most important differences.



Top DIY mistakes

Not providing an optimized flow

- **Prioritize time to pre-test.**
- Understand that every question in the survey provides knowledge and context that can be carried forward.
- Use logic to only show relevant questions and answer choices.
- Ward off any possibility for conflicting data.
- Help respondents have an efficient and seamless experience.

Lack of testing before launch

- **Improve by using logic.**
- Make the time to catch mistakes—it will save tons of time and heartache once the survey is done.
- Give yourself a better understanding of how respondents navigated the randomness.
- Take at least one quick run through your survey to consider it from the respondent's perspective.
- Find someone with fresh eyes to take your survey—it's worth the extra time!



Top DIY mistakes

Not checking attention the right way

- **Be serious but not overly strict.**
- Don't use trap questions hidden in grids.
- Be careful about using a single fail as grounds for removal.
- Use a combination of checks: Attention checks, open-end responses, straight-lining checks, etc. Set a threshold for multiple failures being grounds for removal.
- Use clear, standalone, attention checks to identify those clearly not completing the survey honestly.

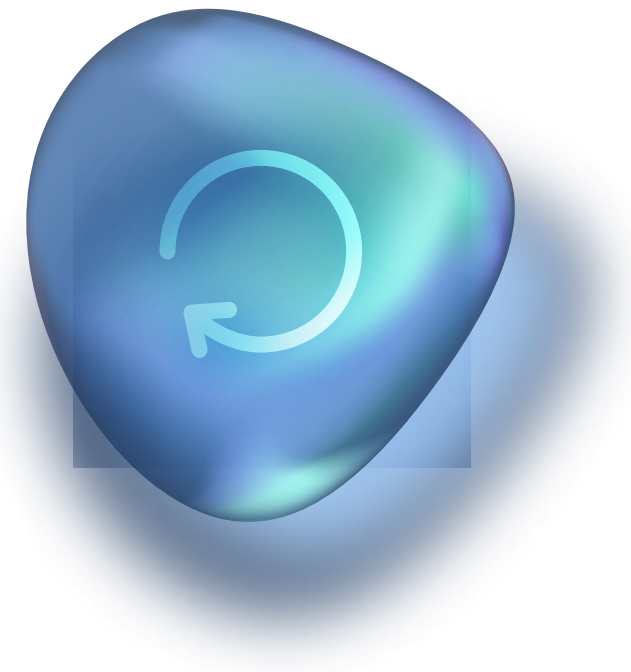




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