

How Can You Make Your Survey Project a Success?

Be sure to dedicate sufficient resources

by Dr. Fred Van Bennekom

I do about a dozen speaking engagements each year for people who have a genuine interest in conducting surveys or improving their survey process.

During the presentations, I have an opportunity to learn about the attendees' surveying efforts.

I'm always struck by the organizational duplicity applied to customer surveying — or just about any program designed to learn from customers.

Many organizations say, on one hand, "Our customers are very important, and we need to listen to them to learn how we can better serve them." But on the other hand they'll say, "We will do the customer surveying effort with current resources and fit it into the staff's current duties."

Why is this? Perhaps a surveying project seems so simple to senior management that the need to commit additional resources isn't obvious.

But a surveying project that does **not** have the proper resources will inevitably be put on the back burner or may even wither completely through neglect.

Let me outline the keys I've learned for how to successfully manage a customer surveying project.



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A dedicated project management focus

Treat a surveying project **as a project**. It requires all the management discipline that you would apply to any other project.

Adequate and proper resources

You need a project manager, whether you are doing the effort internally or whether you intend to outsource part of it. Project management will consume between 25 percent and 100 percent of this person's time, depending on the degree of outsourcing and how quickly you want to get the survey underway.

You will also need a project team composed of representatives from the groups that will be affected by the surveying effort. If you are developing the survey instrument yourself, this team will play a vital role in the instrument design.

The team should be meeting weekly or bi-weekly, so build this into the team members' job plans.

A sufficient budget

Don't be penny wise and pound foolish.

You could format a survey using a word processor, send it out in hardcopy, manually key in the results, and analyze the data with a spreadsheet. Aside from postage and envelopes, there is little direct cost. I've done this! It works!

But, while you are saving money, you greatly increase the labor involved. If your team is not properly committed, you'll complete the project sometime later this century.

Alternatively, you could bring in resources for key components of the project, such as project design and administration, or you may invest in a survey automation tool that will greatly cut the cost of administration.

These tools have their shortcomings, but they will pay for themselves in the first use.

Of course, you can also outsource the survey design effort and/or survey administration.

(Remember, your core competency is delivering support, not conducting surveys!)

A well-developed schedule or plan

If you've never done a survey project, it will probably seem simple — deceptively simple.

The stages are: project planning, instrument design, survey administration, data analysis, and implementing the results.

Within each stage, there are many inter-related individual tasks to accomplish

These may involve a number of people in the organization, so a good plan is essential to keeping the project on track.

A clear statement of purpose

When you start the survey project (or any project), the first question you need to answer is: *Why am I doing this?*

If you can't develop a cogent, one-paragraph statement of your survey project's purpose — or worse, if that statement is "Because I was told to do it" — then the project is in trouble before it even begins.

I've seen many projects try to serve too many masters and wind up serving all of them poorly.

When you tell people that you're doing a survey, you'll find you have lots of new friends.

You'll hear, "Since you have the customer on the phone, could you ask them...?"

Resist the temptation. A survey should be focused on a few limited objectives.

As you proceed with your research for designing the instrument, you may change your focus, but always come back to your statement of purpose and amend it.

A sponsor to beat the path

All projects have political elements and a survey project is no different. You need a sponsor in senior management to work the issues, budgetary and otherwise.

This person will probably also be the person who signs the letter soliciting people to participate in the survey.

An understanding of the methodology

If you're going to do the survey effort yourself, then you will need to become very knowledgeable about survey techniques.

There's more to designing a good instrument than meets the eye.

There are a number of good books on the topic and you'll find a list of them on my web site at http://www.greatbrook.com/survey_research_bibliography.htm

You should also consider taking a workshop or course on surveying.

Even if you plan to outsource most of the project, the more you know about the topic, the better you'll be able to manage the outsourcers.

Accomplishing these steps does not guarantee success, but you'll have a much easier and fruitful journey though your survey project if you apply these lessons.

Fred Van Bennekom founded Great Brook Consulting to apply the lessons he learned from his research and past experience in support service organizations. In addition to his role at Great Brook, Dr. Van Bennekom teaches in the Executive MBA program at Northeastern University's College of Business Administration and at Harvard University's Certificate in Management program. He has also taught at the Hult International Business School, Boston College, Boston University, and Bryant College.

Van Bennekom is a featured speaker at many industry conferences within the U.S. and abroad and has published many articles in both industry and academic periodicals. He is the author of ***Customer Surveying, A Guidebook for Service Managers*** and has contributed to a number of other books.

To subscribe to his Insights newsletter, visit www.greatbrook.com/service_insights_newsletter.htm.