

65 Tips for Conducting More Effective Market Research

# Upturn

POINTING YOU IN THE RIGHT DIRECTION

## Reliable Research



CorCom, Inc.  
Research & Consulting

Lloyd Corder, Ph.D.

# Marketing Research

**A** lot of things seem easier to do than when you actually try them. Marketing Research is no different. It's easy to get off task, ask leading questions and generate questionable results.

Marketing research is an extremely valuable tool. Because we have to market and sell to people who are sometimes very different from ourselves, it's important to know what they think—of your product, service, marketing and other key variables. Without this information, we base important decisions on guessing and hunches. And, in today's high-pressured, get results the first time world, mistakes don't cut it.

What's the solution? Marketing research. Telephone surveys, focus groups, e-mail surveys, and other techniques can all be valuable, efficient and cost-effective ways of gathering key insights about our prospects, customers employees, general community and other audiences. To assume your next project is helping you gather accurate data, use these tips to guide your questionnaire development, interviewing and data analysis.

## Before You Start

1. Determine your research objectives... “What do you want to learn?” and “What do you want to do with the information you learn?”
2. Pick a methodology (focus groups, mail survey, phone survey, etc.).
3. If helpful, brainstorm possible questions and/or question topics to cut down on the time it takes you to develop your questionnaire.
4. Make sure a structured questionnaire makes the most sense (as opposed to asking a handful of open-ended questions).

## Overall Organization

5. Use the funnel technique. Start with the general and move to the more specific.
6. Be aware of question sequence bias (asking one question before another that generates a biased response).
7. Don't ask demographic questions up front unless for screening.
8. Don't start with open-ended questions, unless you have a sensitive topic or a difficult audience.
9. Use transitional statements to signal changes in the topic (e.g., for demographic questions at the end of the survey, "These last few questions are to divide your responses into groups.")

## Introduction and Screening (Phone Surveys)

10. Write out the introduction completely... modify it if wording changes improve participation.
11. Identify the interviewer, research company and broad objectives of the study, without tipping your hand.
12. Focus on the respondents needs—not yours.
13. Check the accuracy of your screening questions (don't include the wrong group; don't exclude the right group).
14. Use only the most important screening questions (the more you have the more the survey will cost).
15. Instead of "we are conducting a survey" use phrases like, "we're asking your opinions about..."
16. If respondent asks, "How long is the survey," say it's taking most people just a few minutes (many people will participate in a 5 minute survey that last 15 minutes, but not a 15 minute survey that lasts 15 minutes).

## Question Structure and Wording

17. Use open-ended questions sparingly.
18. Ask exactly what is needed and only what is needed.
19. Make sure the question is technically accurate.
20. Use exact time references (use “during the past 12 months” for “past year”).
21. Rotate questions on long lists (start with next question in sequence, complete the list, then ask first questions in sequence... each interviewee would be asked the question responses in a different order).
22. Use words appropriate for the target audience.
23. Avoid hard to pronounce and understand words.
24. If using a rating scale, make all numbers follow the same path (e.g., “bad’s, low’s, etc.” all receiving a “1” while “good’s, high’s, etc.” all receive a “10”).
25. Don’t use ranking procedures (“1” for the “best,” etc.) in telephone surveys unless there are few categories (3-4).
26. Make your response categories follow the same flow for every question... do not “trick” the eyes of your readers (e.g., down the column, then next column, down the column, etc.).

## Formatting Questionnaires

27. Develop you own layout or design style—and stick to it!
28. Divide the questions into sections (for mail surveys, label the sections).
29. Distinguish questions (what should be read) from answers (what should be replied)... e.g., questions in bold, answers in non-bold.
30. Provide skip-to directions (words, arrows, etc.) immediately following the question answers.
31. Make question directions and skip-to commands look different from the rest of the text (e.g., ALL CAPS).
32. Number questions sequentially and use letters to identify parts or sub-questions (1, 2, 3, 4a, 4b, 4c, etc.).

- 33. Don't split questions between two pages.
- 34. Keep question directions simple.
- 35. When appropriate, use an answer sheet that is separate and simpler than the questionnaire.
- 36. Make sure question responses are exclusive and don't overlap one another (e.g., 0-100, 100-200, etc. should be 0-99, 100-199, 200-299, etc.).
- 37. You want responses to ONE or ALL THAT APPLY categories.

## For Mail and/or Printed Surveys

- 38. Use a booklet format... image is everything.
- 39. Have the booklets professionally printed (in two colors, if possible).
- 40. Leave plenty of white space... don't make the survey look crowded.
- 41. Avoid too many type styles and fonts (use one primary font for the questions and perhaps a second for section titles).
- 42. Make the survey look like enjoyable research—not junk mail or something you would enter in a design contest.
- 43. Use a warm, friendly cover letter—signed in blue ink.
- 44. Spell the respondents name correctly.
- 45. Use a professional looking stamped envelope (usually #10).
- 46. Include a postage-paid return envelope (#9).
- 47. Avoid bulk mail.

## Field Instructions

- 48. Provide specific instructions on how to handle problems.
- 49. Identify types of responses that need to be probed and which probes to use.
- 50. Don't clutter the questionnaire with standardized instructions (include them on a separate page).

## Protesting Questionnaires

51. Have your “trusted” editors, advisors review drafts of your questions.
52. Show the questionnaire to your interview staff (the more seasoned ones will spot problems immediately).
53. If a telephone or intercept interview, print only a handful of questionnaires for the pretest.
54. Watch the first few interviews carefully... alert the interviewing staff to the problems and tell them how you're going to solve them.

## Administering the Questionnaire

55. Give positive “listening” behaviors to the respondents (encouragement, positive tone, friendly voice, etc.).
56. Make the survey seem easy to do to the respondents.
57. For phone surveys, use a three-attempt (with two call backs on different nights) strategy.
58. Never put down or demean a respondent.
59. Never, never, never violate trust by using respondents from a research study for follow-up sales calls (exception: some customer satisfaction surveys as previously described).
60. For phone, call between 5:00-9:00 p.m. Note the changes in time zone.
61. Avoid monotone, slow, soft spoken interviewers.
62. Pay interviewers by the hour not the interview.
63. In general, call from a central location and make sure all interviewers are supervised.
64. Reread the survey immediately following the interview to make sure every question is completed and that open-ended questions are coherent.
65. For open-ended questions, write what the respondent actually said (their words), not “this woman thinks...”