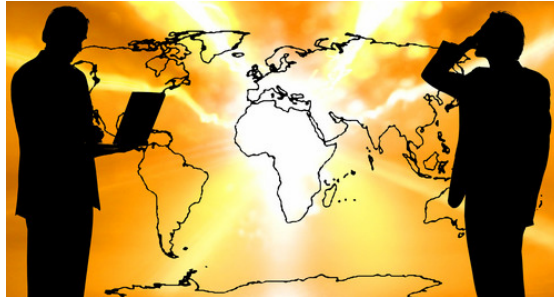


**BEST PRACTICES**  
**BEST PRACTICES FOR INTERNET BASED RESEARCH**



A compilation of best practices from  
the Communique Partners Staff

## Survey Design Tips

- ▶ **Use caution when moving phone or paper-based surveys to the web.** Don't try to reproduce it exactly as you would for a phone/ mail survey. Surveys need to be web savvy and web friendly. Unlike other methods, complex logic, skip patterns, randomization and various other functionalities can be programmed into an online survey to make it user friendly and more custom to each respondent.
- ▶ **Design surveys to be engaging.** Leverage visual effects available in online research to enhance the survey taking experience (i.e., wherever possible use color themes, corporate logos, product logos/ images, multimedia, flash, survey personalization, etc.)
- ▶ **Keep the questionnaire short.** Allow respondents to complete the survey in 15 minutes or less. Give the respondents the feeling of moving quickly through the survey, especially at the beginning. Use a progress bar whenever appropriate and incorporate piping, pass-through data, logic (to avoid non-relevant responses), etc., etc. to make the survey succinct.
- ▶ **Only place a few questions on each page.** Try to minimize the amount of scrolling the respondent has to do. Also, place only one large matrix per page since this usually requires evaluating multiple items on one question and use alternating background colors for each response label. Don't overwhelm the respondent.
- ▶ **Design the questionnaire to go from general to specific.** Ask about the overall impression before you ask about their impression of specific features/items.
- ▶ **Use the product's built-in features and design options to reduce response bias and assure data integrity.** For example, use of randomization of answer options and/or pages, disabling the back button so respondents do not change previous answers, use of exclusive None, Does not apply, Other-please specify answer options, etc.

- ▶ **Make the respondent feel that his/her opinion matters.** Let respondents know how results will be used (i.e., to serve them better, to enhance a product, for customer satisfaction, to inform HR of employee satisfaction, etc.).
  
- ▶ **Be up-front with the respondent.** Let them know if the survey requires special software or plugins (i.e., presentation downloads, for viewing videos/images, etc.). Tell them how long a survey should take to fill out, survey due date, etc.
  
- ▶ **Assure respondents that you will respect their privacy.** Assure them that their answers will only be evaluated in the aggregate and that demographic questions will be used for statistical purposes only. Never ask for full name, phone number or address unless it's absolutely necessary (i.e. for use on a recruitment survey / panel or incentive / sweepstakes offering).
  
- ▶ **Word personal questions tactfully.** Ask demographic questions the end of the survey and remind respondents why you need this information. Perhaps make some questions non-mandatory or provide opt-out options like decline to answer, or N/A.

## Survey Deploying Tips

### Before Deployment:

- ▶ Whenever possible de-dupe your email list to avoid deploying a survey to the same respondent more than once.
- ▶ Make sure you have a final online survey approval from the client or project director before deploying your survey.
- ▶ Test access of final URL.
- ▶ When appropriate test to make sure a survey can only be taken once per computer station, or validate for unique PINs.
- ▶ Make sure you have confirmed the email invitation text, the subject, the from, and the email address lines with your client or project director.

- ▶ Make sure the AOL link is prepared and working.
- ▶ When appropriate make sure pins and pass-through data have been uploaded into the survey and tested.
- ▶ Where appropriate make sure the back-button to your survey has been disabled to avoid respondents changing their initial response.
- ▶ Ensure your support email address is included with your email message and in the survey itself so respondents can contact you if they are having technical difficulties or have any questions or concerns with the study.
- ▶ Whenever possible avoid emailing a survey on a Monday or a Friday. Depending on the subject of a survey, this could decrease response rates.

#### **After Deployment:**

- ▶ Monitor deployed survey's performance via reports. Check frequencies to make sure your survey is in fact being accessed and to make sure there are no technical or logical errors.
- ▶ Check your support email account right away to make sure there is no immediate survey taking errors with your survey.
- ▶ Inform your client the survey was deployed so the client can access real-time data/reports.
- ▶ Provide customer support to each respondent in a timely manner.

#### **Email Invitations Tips**

There are many key words you should avoid to elicit common SPAM triggers. For example on the subject line should not use the words "win", "prize", "sweepstakes" "Free" or have a dollar amount (i.e. "\$1000"). By adding these types of words your email could be tagged as SPAM. Sender should be the name of the research company and/or the name of that research company's Project Manager. Note; whenever possible use the legal name of the company that's doing the research (i.e. T-mobile, Motorola, etc.).

**The body of the message should include all of the following:**

- ▶ Declaration of sender of the email, i.e. sponsoring company or research company, where applicable
- ▶ Brief explanation of the purpose of the study
- ▶ Explanation of where/how the recipient's email address was obtained
- ▶ Incentive information
- ▶ Sweepstakes rules or link to the rules, if applicable; the rules link can also be placed on the first page of the survey.
- ▶ Opt-out information, i.e. reply to email address or other method for recipient to be removed from mailing list
- ▶ Clear instruction on how to access the survey (i.e., click here or copy and paste link onto browser)

**The body of the message should not...:**

- ▶ State that it is "not SPAM" (or use the word SPAM at all)
- ▶ Sound anonymous or vague
- ▶ Have lengthy text explaining the way the data will be used
- ▶ Use pressure language such as "must" or "hurry now"

**Reminder emails should:**

- ▶ Be sent ONLY to non-responders
- ▶ Be sent once only or twice (i.e. no multiple reminders)
- ▶ NOT be sent to people who opted out of the first mailing
- ▶ Have the word "Reminder" in the subject line
- ▶ Be an abbreviated version of the first email

**Key points to include/reference in your email invitation:**

- ▶ **Screeners:** If there are screeners, include a statement around how the respondent must fully qualify and complete the survey, in order to be eligible for the incentive. Without divulging the actual research methodology behind the study, you may find the need to include verbiage about being screened out – i.e. it is possible you could get screened out, or, we are looking for a specific target market.
  
- ▶ **Quotas:** If quotas will be instilled on the survey, include a statement around how the respondent will have to complete the survey within a specific timeframe, and/or that only the first 300 respondents who fully qualify and then complete the survey will receive the incentive.
  
- ▶ **Source of List:** Since we are required by law to identify the source of the list, i.e. how we obtained their email address, a statement of such should be included, i.e. ‘Your email was provided by the client conducting this market research study, or ‘You are receiving this invitation because you join our panel’. However, when partnering with professional sample companies, like ours, these companies will address this area of concern and respondents will also most likely recognize the source.
  
- ▶ **Opt-Out Capabilities:** Though the respondent may have opted to participate with a list broker service, having provided their email voluntarily, or are part of a client’s sample list provided, there must be a way for them to elect not to participate, or more definitively, to be removed from the mailing list upon request. Therefore, a statement of such should be clearly communicated, i.e. ‘To be removed from future mailings of this type, please send a reply to this email and include in the subject line - ‘Remove from ABC Study’. Or ‘Click here to unsubscribe from this study’

**Whitepapers - Restrictions On Association Fax and Email Marketing Statutes regarding unsolicited email**

<http://www.centeronline.org/knowledge/whitepaper.cfm?ID=645&ContentProfileID=122137&Action=searching>

### **AOL Users – A Special Note:**

AOL browsers do not support traditional hyperlinks as do Internet Explorer or Netscape, whereby the URL appears in its appropriate format (i.e. underlined, blue, like this: <http://www.msn.com/>) To accommodate Netscape, IE and AOL users simultaneously, a separate paragraph could be included in the email invitation for AOL users as follows, whereby you include the HTML tag with the link, example below: AOL USERS: We encourage you to minimize the AOL window and to use a browser such as Internet Explorer or Netscape, however, if you prefer to use the AOL browser, then please use the following link:

<A HREF="<http://www.msn.com/>"> Click here to access your survey</A>

### **Top Ten Survey Pitfalls**

- 1. Survey is too long – lengthy surveys can increase dropouts, or worse, inaccurate data caused by respondents clicking through too quickly to complete the survey.**
- 2. Requiring respondents to perform offline research or calculations**
- 3. Under-budgeted projects**
- 4. Mail, fax or phone recruit to a website**
- 5. Duplicating paper-based forms on the web; inflexibilities towards web-izing studies.**
- 6. Recruiting respondents without immediately sending out a survey (or phone recruits without an email confirmation). This can reduce the sample base's desire to participate.**
- 7. Establishing unrealistic expectations of response rates**
- 8. Insufficient project planning, setting of expectations and agreement on deadlines, unrealistically quick turnaround or poorly defined scope**
- 9. Insufficient attention and time allocations considerations besides survey creation (i.e., sample acquisition, incentives, quality control)**
- 10. Not offering an appropriate incentive to your respondents (i.e. sweepstakes, per respondent incentive, gift certificates, sharing of survey results and reports, etc.)**

## Sampling Tips

- ▶ **Have a clear definition of the target audience. i.e., demographics or behavioral requirements.**
- ▶ **Use appropriate sampling methods. I.e., randomly pulled records, mirroring key demographics of your target audience, etc.**
- ▶ **Be aware that click through rates vary depending on the sample source. Set client expectations accordingly.**
- ▶ **For most opt-in databases a 5% click-through rate is anticipated.**
- ▶ **This completely depends on your sample source (i.e., using a sample warehouse vs. using internal opt-in lists')**
- ▶ **For membership communities (like eRewards), the anticipated click-through rates are typically higher (10% to 20% response rates). Be aware that such communities may have unique lead-times or survey content standards.**
- ▶ **ePanels, have the highest click through rates (typically 30% to 60% response rates). (note to Daniel please link to panels section).**
- ▶ **Offer incentives to increase click-through rates. Some sample vendors require that an incentive be offered.**
- ▶ **Recruit participants immediately before deploying an online survey. With phone recruits, send a confirmation email immediately after the call.**
- ▶ **When conducting in home-product tests, screen and recruit participants immediately before deploying an a targeted survey. Send a confirmation email of qualification and keep consumers advised of project timelines and respondent needs and expectations.**