

# How to Run Surveys to: Generate Leads, Market Research and Opportunities for PR

Part of our Series: **Filling the Sales Lead Pipeline  
for Your Company**

*The Tactics and Tips to Get You There*

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- CEO & Creative Director
- Jeff heads the demand generation team within the agency - currently running B2B lead generation programs in 91 countries, 21 languages.
- 3marketeers has been one of Silicon Valley's leading marketing and demand generation agencies for 28 years.
- Primary responsibility for:



# Beryl Israel

- Vice President, Account Services
- Beryl leads the Account Services team at 3marketeers, working with agency clients on account planning, messaging, creative, content, media, and branding initiatives.
- 25+ year track record with regional, national and international companies in high-tech, healthcare, insurance, financial services, medical devices, hospitality, real estate, and non-profits.
- Primary responsibility for:

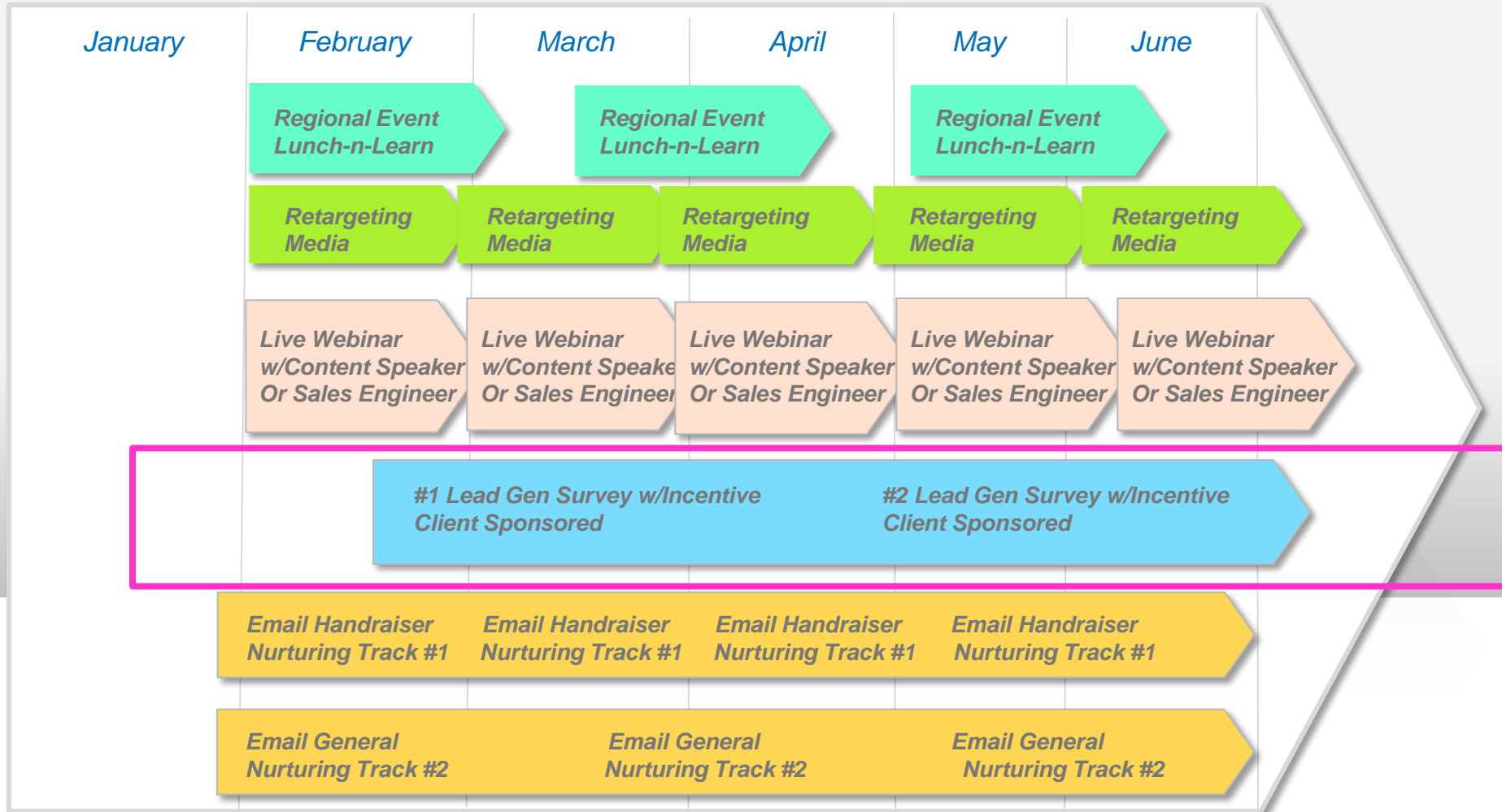


# Agenda

- Fit in overall demand generation plan
- Online survey uses
- Survey planning – set your goals
- Incentives
- Writing survey questions
- Seven tips to help hit your goals
- Managing a successful survey program
- Questions and Answers



# How Surveys Fit in your Overall Demand Gen Plan



-  Webinar: Live/OnDemand
-  Sponsored Survey
-  Nurturing Emails
-  Lunch-n-Learns
-  Retargeting

# Online Surveys Have Many Uses

- Customer/Employee Feedback
- Product Development Feedback
- Event Evaluations
- Training and Education Evaluations
- Message Testing
- Market Research
- Content Creation/Public Relations
- Sales Leads



# A Research and Marketing Tool

## Through a Third-Party

- Research without bias
- Anonymous
- Subtle prospecting, with permission
- Qualify prospects and guide them into the sales funnel

## Using Your Company Identity

- Ask if they want more information
- Redirect them to your website
- Capture contact information
- Qualify prospects
- Guide them into sales funnel



# 1. What do you want to accomplish?

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- Have a concrete reason for conducting a survey
  - Content generation
  - Message testing
  - Audience segmentation
  - Competitive research
  - Lead qualification
- Develop your conclusion in advance
  - *Isn't that biased?*



## 2. Survey Incentives

Is your incentive really worth their effort?

- Provide research findings = more quality
  - Compare to peers
  - Learn best-practices
  - Get new ideas
- Give a gift = **3x more quantity**
  - Enter a prize drawing for completion
  - May require personal information for fulfillment, *make that clear*



*Incentives can raise response rates by 50% to 300 %*

# 3. Types of Questions

- Organize your survey like chapters
  - Group like-minded questions together
- Consistency
  - Don't mix too many types of questions with different formats and different scales



Survey

9. Do widgets enhance your business?

Yes

No

Maybe

I don't know

10. Do widgets enhance your business?

Enhancement	Yes	No	Maybe	I don't know
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

11. Do widgets enhance your business?

	None	Some	About Average	More	All
Yes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
No	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Maybe	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I don't know	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

12. Do widgets enhance your business?

	10%	20%	30%	40%	50%	60%	70%	80%	90%
Yes	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
No	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Maybe	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I don't know	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

13. Do widgets enhance your business?

	Yes	No	Maybe	I don't know
10%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
30%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
40%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
50%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
60%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
70%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
80%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
90%	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# Multiple choice vs. Open-ended

The image compares two survey question formats. On the left, a multiple-choice question asks '3. How would you rate the convenience of Widgets?' with four radio button options: 'Very convenient', 'Somewhat convenient' (selected), 'Not so convenient', and 'Inconvenient'. Below the options are 'Prev' and 'Done' buttons. On the right, an open-ended question asks '\* 2. How would you rate the convenience of Widgets?' and provides a text box containing the response: 'Widgets have made it possible for our IT operations group to detect and repair the root cause of network problems three times more quickly than before.' Below the text box are 'Prev' and 'Next' buttons. A central grey oval with orange arrows points from the multiple-choice question to the open-ended question, containing the text 'Sometimes appropriate' and 'Usually better'.

**Survey**

3. How would you rate the convenience of Widgets ?

- Very convenient
- Somewhat convenient
- Not so convenient
- Inconvenient

Prev Done

*Sometimes appropriate*

*Usually better*

**Survey**

\* 2. How would you rate the convenience of Widgets ?

Widgets have made it possible for our IT operations group to detect and repair the root cause of network problems three times more quickly than before.

Prev Next

# Don't assume: Ask, don't tell

The image displays two side-by-side survey screenshots. The left screenshot shows question 6: "6. Widgets greatly enhance our business operations by:" with five radio button options: "0 to 10%", "11 to 25%", "25 to 50%", "51 to 75%", and "76 to 100%". Below the options are "Prev" and "Next" buttons. The right screenshot shows question 7: "7. Do widgets enhance your business?" with two radio button options: "Yes" and "No". Below question 7 is question 8: "8. If widgets enhance your business, what is the approximate enhancement?" with five radio button options: "0 to 10%", "11 to 25%", "25 to 50%", "51 to 75%", and "76 to 100%". Below question 8 are "Prev" and "Done" buttons. A central grey circle with a brown border contains the text "That's assumptive" and "This isn't" in red. Two orange arrows point from this circle to the question 6 options on the left and the question 8 options on the right.

**Survey**

6. Widgets greatly enhance our business operations by:

- 0 to 10%
- 11 to 25%
- 25 to 50%
- 51 to 75%
- 76 to 100%

Prev Next

*That's assumptive*

*This isn't*

**Survey**

7. Do widgets enhance your business?

- Yes
- No

8. If widgets enhance your business, what is the approximate enhancement?

- 0 to 10%
- 11 to 25%
- 25 to 50%
- 51 to 75%
- 76 to 100%

Prev Done

# Tips for writing survey questions

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1. Write questions that give you options for conclusions.
2. Have fun - write the PR headline in advance:
  - *How would you rate the problem of xyz?*
    1. Not too upsetting.
    2. Comparable to a fender bender.
    3. Like losing your wallet.
    4. Similar to being audited by the IRS.
    5. I would rather have a root canal.
  - “73% of IT directors would rather have a root canal than experience xyz.”

# 4. Keep it short, keep it positive

- How many questions would YOU actually answer?
  - Time (5–10 minutes)
  - Question fatigue (keep to 8–14 questions)
  - Validity of data
- What would you answer truthfully?

*Why is your  
networking project  
failing?*

**-or-**

*What would make  
your networking  
project more  
successful?*

# 5. Test

- Just a few colleagues
- Simple to take?
- All questions make sense?
- All answers work?
- Skip logic works?
- Time-to-complete is accurate?
- Submit works?
- Do you allow 1 response per computer, or repeat visits?
- Where is the exit page going?

# Pilot

- A sample of the real audience
- Test Subject lines
- Test html vs. text invitation
- Does it get opened?
- How far do folks get?
- Drop-offs/completions
- Does the data make sense?
- Was your hypothesis “close” – or should you start over again?



# 6. Running the survey

## Users

- Can I trust you?
- What's in it for me?

## Organization

- Why are we asking?
- What will we actually do with this information?

State the purpose of the survey!

State the goals – duration – incentive

Let them know it's private and that data will  
be used in aggregate only - and stick to it.

## Trust

Assured reliance  
confidence or faith is placed  
the truth, worth, reliability  
dependence on future or  
belief in the honesty, integrity



# Don't Forget the Email Basics

- Consider your audience
- Don't forget to personalize
- Focused call to action
- Align the reward with the effort
  - Peer data is often all you need
- Remind, but respectfully
- Repeat: compare last survey to your current results
- State your Privacy policy



# Send Via Marketing Automation

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- Track performance ongoing
  - Opens
  - Visits
  - Submissions
  - Effectiveness of text vs. html invites
  - Headline differences on invitations
- Get progress from every step of the process.
- Re-send to those who did not open, for example.

# 7. Understanding the data

- Samples don't have to be large
  - 400 (95% confidence / within 5%)
  - 200 (93% confidence / within 7%)
- Don't draw suspicious conclusions
  - Correlation  $\neq$  causation
  - Two data points may be unrelated



*All cats have  
four legs*



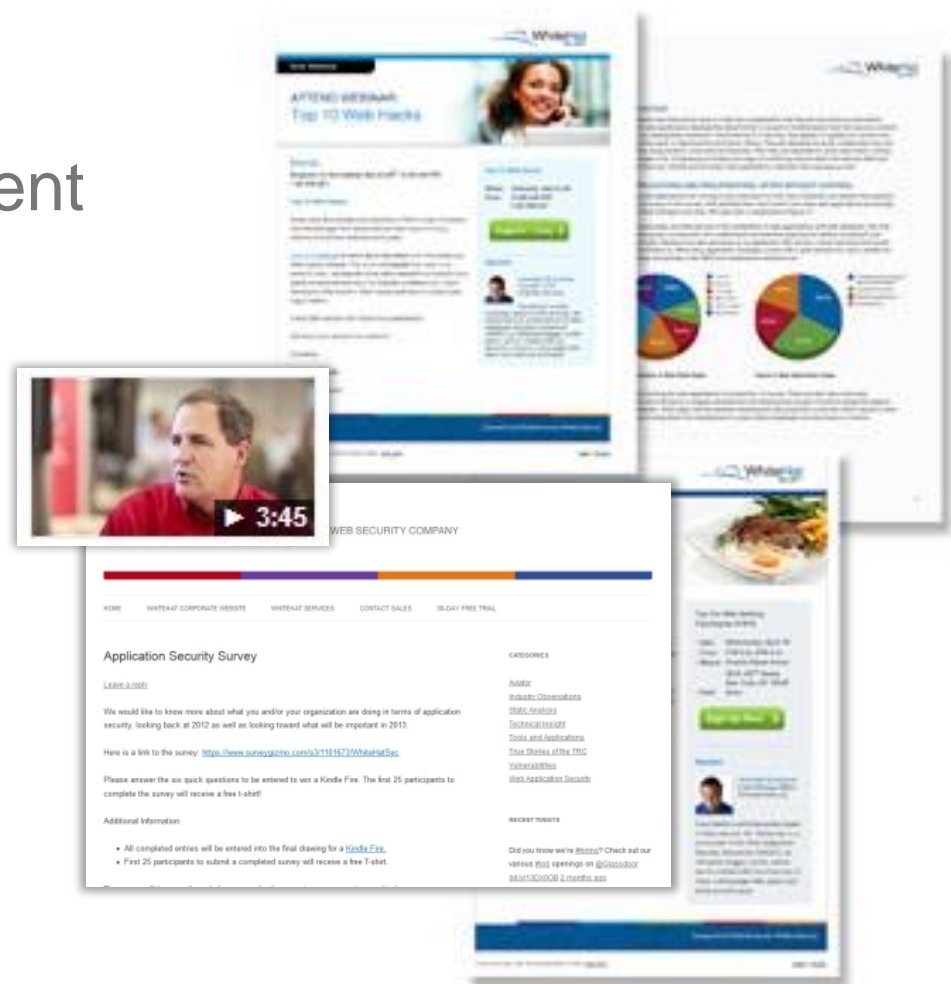
*This animal  
has four legs*



*Therefore this  
animal is a cat*

# 8. Repurpose results to other form factors

- “Findings” Report
- Email newsletter content
- Website content
- Blog posts
- Videos
- Webinar



# Seven Tips + 1

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1. What do you want to accomplish?
2. Make it *easy* .... A few simple rules
3. Stay on the sunny side
4. Test, test, test
5. Feeding the fire, send more than 1x
6. And the data says
7. Leverage the new content in other forms
8. Rinse and Repeat – update the findings

# 8. Rinse and Repeat

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- Update the report on the shift in data
- Add user quotes
- Ghost write an article for opinion

# Tools we use for surveys

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- Easy online data collection



- More sophisticated data collection



- Easy-to-use marketing automation, sending emails, landing pages and reporting



# Questions & Answers

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**Submit questions in the lower right corner of your screen.**

For more information contact

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