

USING ELECTRONIC SURVEYS

BASED ON OUR ARTICLE IN HRMAGAZINE

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Electronic surveys hold the promise of easy, efficient information. By eliminating the time and expense of printing and mailing, they present new opportunities for quick, tactical surveys. The lower expense may even make surveys practical for businesses and nonprofits who could not afford them before.

When e-mail and Web surveys first appeared, there were few options; but, now, the software choices have exploded. Many prepackaged programs include question banks or item libraries, designed so that marketing departments can sell “turnkey” surveys. However, making a survey using bits rather than ink does not change the basics; you still need to have good, valid questions which are relevant to the organization, reflecting its goals, strategies, and situation. *Browse through Toolpack.com for more information on good survey practices.*

Advantages of electronic surveys

The main advantages of electronic surveys are speed and cost. Electronic surveys can be used when fast action is desired – for example, to find out if a program or change effort is being rolled out effectively to every area of the organization; or to learn if a policy is effective before eliminating it. Electronic surveys can quickly be used to assess understanding of and alignment with the organization’s strategy and goals. In short, because a brief electronic survey can quickly be deployed to all parts of an organization, including field reps and international locations, it can be used to gather information which in the past may have been inferred from less accurate or complete sources.

Speed also means that respondents can get the findings for action planning sessions before the project has “gone cold.” That means a greater chance of success for change initiatives.

One often-overlooked advantage to electronic surveys is the tendency for more people to fill out open-ended questions, presumably because it is easier and faster to type answers than to write them out by hand. This makes the results richer and probably more reflective of how people in the organization really feel.

Concerns

Savvy employees know that electronic surveys have confidentiality risks. Names appear on e-mail messages, and their computer’s network location can be gathered by a Web survey. Where trust is an issue, using an outside vendor can help, though it is not a cure-all. While e-mail is usually a better way to run the survey, it is also more easily intercepted by the internal IT staff, so when privacy is a concern, we suggest running a Web survey on a secure server (where traffic is encoded to avoid snooping). As with all survey projects, anonymity should be written into the vendor’s contract.

On a technical level, software can fail, and data can be mishandled. There have been problems with e-mail clients unable to handle long messages, companies which assumed everyone was on Windows when in fact there were sizable UNIX and Macintosh contingents, survey messages blocked by organizational firewalls and spam filters, and Web browsers not set up to allow Javascript. All these problems can be avoided, but pilot testing is essential.

Another technical issue is viruses – this really applies mainly to e-mail surveys. The best way to deal with viruses is to have a good, updated antivirus program, though we also recommend using an e-mail client like Eudora rather than Outlook to send out and receive the surveys. Eudora stores messages in plain-text format, which can be very helpful when troubleshooting; it also stores incoming attachments (automatically renamed to avoid erasing one file when another comes in with the same name) in a designated folder, which makes virus detection and removal easier. Finally, Eudora is not prone to most (if not all) of the viruses written for Outlook, so even if an Outlook virus is received, it may have no opportunity to do any damage.

Types of electronic surveys

Plain text. One of the easiest types of electronic survey is plain-text e-mail, which can be used by people with just about any computer and operating system, even mainframes. A message is sent out to all participants, who put marks between brackets or other symbols, and then send it back. It tends to have a slightly higher response rate than paper or Web surveys. What's more, reminder messages can be sent out automatically, and controlling for duplicates is relatively easy because each person's e-mail address comes with their message. The main drawback is the ease with which an internal IT person can tap into the outgoing e-mail stream and read individual surveys, if they choose to.

Attachments to e-mail. It's hard to sell plain-text e-mail surveys, because while they are effective, they are not cosmetically attractive, and cannot show graphics. As an alternative, organizations can send an e-mail attachment with each message; that message can be a file with forms and macros, a small program, or even a Java program. The main problems with these are cross-program or cross-platform compatibility, the size of the messages, and the extra step required for respondents (two extra steps if they have to fill out a form and then attach it to a new e-mail reply message). They may also spur virus / trojan programs' warnings or be blocked entirely. They usually do work, though.

Web surveys. Bypassing the problems of e-mail are Web surveys, which can be placed on a secure server so that snooping on the respondents' answers is nearly impossible – a situation which should arise rarely. Respondents must have Web access, and duplicate surveys may be an issue in some organizations. However, surveys can be quite presentable and incorporate graphics and tables.

Recommendations

Electronic surveys pose both new opportunities and new challenges and risks. They are increasingly popular, and most organizations should find them to be very useful. However, choices regarding methods and techniques should be made with almost the same care as the most important issues – what questions to ask, and what to do when the results come back.

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