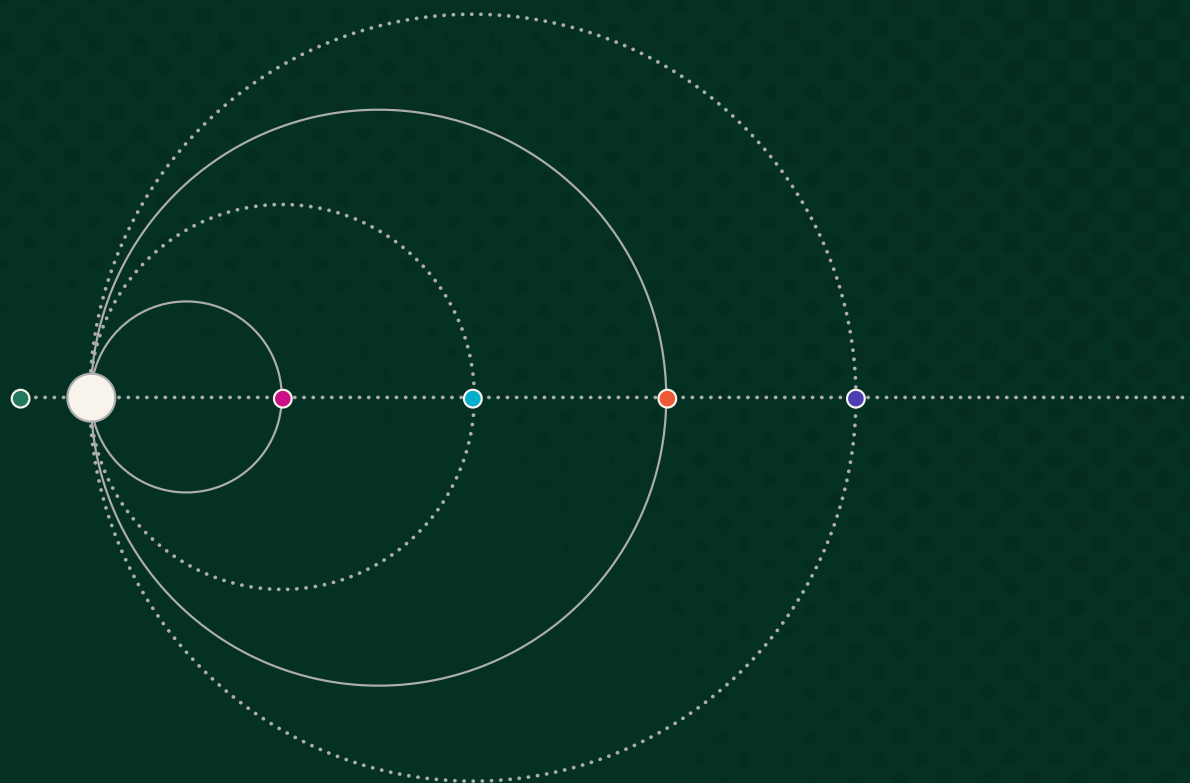


GUIDE FOR ASSOCIATES AND ANALYSTS

Running surveys with clarity and confidence



INTRODUCTION

Guide for associates and analysts

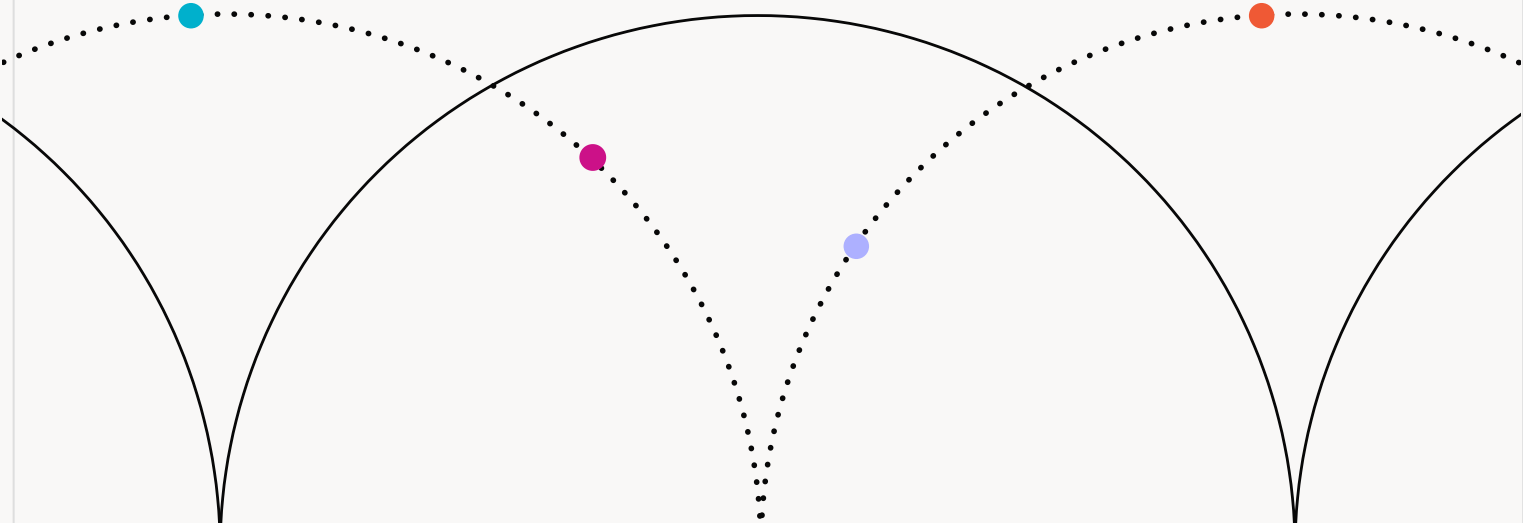
Survey-based research is invaluable. But getting from initial idea to insight can be more complicated than it needs to be.

We’ve designed this step-by-step guide to help consultants like you work with speed and confidence at every step.

When you combine a smart approach with solid support, survey projects are easier, faster, and deliver data you can trust.

This guide will enable you to:

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SECTION 1

Plan ahead

Great surveys don't happen by accident. **They are planned for success at the outset.** Follow the below steps to make sure you've got a solid strategy in place before you begin writing your first question.

STEPS

1

Align on essentials

Set timelines, roles, responsibilities, and budget.

2

Define your research objectives

A strong research objective is clear, measurable, and attainable. Ask:

- What are you hoping to learn from the survey?
- What specific questions does your client need answered?
- What types of information will you need to cut the data later?

3

Identify the target audience

Consider:

- **Demographics:** Age, gender, income, geography
- **Firmographics:** Industry, title, role, company size
- **Psychographics:** Values, attitudes, interests
- **Behavioral:** Brand familiarity, purchase history, decision-making processes

4

Set sample sizes and quotas

Determine how many respondents you need to reach, and how to balance them across different subgroups.

5

Select your partners

Look for companies that understand your goals and research workflows.



IncQuery insight

Think ahead about what information you'll need when you cut and filter your final data. The screener section, discussed in the next section, is a good place to gather this information.

SECTION 2

Create your survey

The data you collect is only as strong as the survey you create. With **thoughtful design, targeted screener questions, and experienced partners**, your survey will run smoothly and provide the insights you need. Take these steps to draft your survey:

STEPS

1

Draft your screener section

Screener questions should appear at the beginning of the survey. Ask questions to weed out anyone who lacks the required experience, authority, knowledge, and behaviors.

2

Write clear, objective questions

Questions should:

- Avoid leading wording
- Focus on one issue at a time
- Avoid (or define) terms or acronyms that could be confusing
- Provide exhaustive, non-overlapping answer options

**IncQuery insight**

Aim for about 10–15 questions in your screener.

3

Choose appropriate question types and response options

Match the question format to the type of data you need. Common formats include: single choice, multiple choice, matrices, and open text fields.

4

Coordinate with your programming partner

A strong programming partner should do more than just code. It should pair you with experts who can provide top-level and granular guidance and support. At the start of each research project, talk to your programming partner about:

- Objectives
- Timelines
- Logic and response paths
- Subgroups to track or cap
- Quality control flags

**IncQuery insight**

Working with multiple panel providers gives you the highest quality sample, faster recruitment, and allows you to pivot quickly if your targets are not being met.

5

Work with panel providers

Be prepared to share information about your audience profiles, screening criteria, survey length, and subgroups.

SECTION 3

Go live

Launching your survey requires more than flipping a switch. By testing and soft launching your survey, you'll have the opportunity to **catch and resolve issues before it's too late**, affects data quality, or requires costly re-fielding. Below are steps to take:

STEPS

1

Test the survey

- Take the survey multiple times and
- provide different responses.
- Test the survey on multiple devices.
- Don't just answer randomly!
- Select options in the way that a
- respondent realistically would.



IncQuery insight

While this step can feel like it's slowing you down, it will save time and effort in the long run.

2

Soft launch

Open the survey to no more than 10% of respondents. Based on the results, ask:

- Am I reaching my audience, including all quotas?
- Is the data quality what I expected?
- Are my quality controls flagging suspicious responses?
- Where are people dropping out?
- Are reporting dashboards working?
- Are some questions being misunderstood?
- Is the logic working properly, or are people seeing (or not seeing) questions they shouldn't?

3

Adjust and refine

Fix any problems you uncovered during the soft launch.

4

Full launch

Roll the survey out to all respondents. Review the results as they come in to:

- Identify any new issues
- Begin preliminary analysis
- Start drafting client deliverables

5

Close the survey

End data collection once you've met all of your quotas.

THE BIG QUESTION

Is your programming partner up to the task?

Choose a programming partner that works as part of your team. The right partner should deliver:

Speed: Eliminate programming delays or learning curves.

Quality: Experienced programmers support development, handle coding, catch issues, and add quality control flags.

Efficiency: Avoid missteps that cost time and money.

Peace of Mind: You can focus less on programming and more on design and insights.

The right support streamlines the survey process and ultimately delivers the high-quality results you expect from a due diligence or corporate strategy survey.

When you follow the steps in this guide, and have the right partners by your side, you'll get accurate and actionable insights with speed, efficiency, and confidence.

About IncQuery

IncQuery is how consulting and private equity firms can finally be sure that their primary research is sound. No one should have to defend an analysis that they have lingering doubts about. And research should never feel like a series of trade-offs between certainty and speed.

IncQuery's tech-plus-expert model equips firms to do more in real time, verify in no time, and collaborate at any time – so they can shorten the entire research cycle without cutting corners or compromising their objectives.

That's why so many leading firms rely on IncQuery to make sure their insights are indispensable. And it's how IncQuery has saved clients 200,000+ hours since 2016.

Visit IncQuery.com to learn more.