

10 Things to Negotiate When Buying an Online Survey Tool



Online Surveys, are questionnaires helping you to collect data from a targeted audience, to help you make decisions and improvements. You can use these surveys for Net Promoter Score (NPS), Customer Satisfaction Surveys, Market Research Surveys, Employee Satisfaction Surveys, Post Event Surveys to name a few. Initially most Online Survey Tools seem fairly similar, but as you start using surveys more and more to collect more meaningful data for your business, you will start to see the differences and limitations are more significant. Changing survey tools can be a painful experience, especially if you have a lot of historical data that you use for creating trends etc.

Before starting a survey it is important to know the purpose and goal of your survey, what decisions are you trying to make? The results should provide you with the valuable information you need to make informed decisions.

Here are our top ten things we think you need to ask for:

1 – Top 10 Features – Consider what specific features your business need.

- **Question types** – Many tools vary here but you should expect the following different question types as a minimum:
 - Questions where you can only have one answer.
 - Questions where a number of answers are allowed.
 - Questions where you might be collecting a number as an answer with decimal points
 - Free text answers. (Check if there a limit to the number of characters).
 - Questions with rating scales, where the respondent can rate using smiley faces, check boxes, NPS, etc. Check if there is a limit to the scale?
 - Questions that can use pictures and videos.
 - Questions where the respondent has to place selections in a ranked order.
 - Fixed sum survey questions, is there a running sum as the respondent completes the fixed sum questions?
 - Allow a respondent to skip a question if they wish or insist, they answer all questions.
- **Survey Logic** – Also known as Skip Logic, these are routing questions that show different questions based on previous answer(s), allowing the respondent to skip questions that are

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not applicable. Also Piping questions where a question or answer incorporates information acquired earlier in the survey.

- **Data Output** – Most tools will have their own analytical dashboard to analyse the results but will also provide the ability to export to an analytical tool. As a minimum, tools should allow you to export data in CSV or excel format, some will also provide Triple S or SPSS format.
- **Accessibility** – Look for the ability for respondents to complete the survey on any smartphone, tablet and laptop device. Appearance should be customised for each type of device and adapt appropriately. You should be able to test this feature.
- **Share-able** – You should be able to share the survey and customised reports results with your team for free or for a minor cost.
- **Targeting Options** – You will want options to ensure respondents are selected by certain criteria, targeting who and when they see the survey i.e. time of day, guided by behaviour on website, location, new visitor, returning visitor. Also are there controls for repeatedly surveying the same individual too many times? In the instance that you are emailing surveys, ask for the ability to restrict access to only those that the survey has been sent to?
- **Customer Experience and Interactive Tools** – It is hard enough to get people to complete a survey, research shows the more interactive a survey the more engaged a respondent is. Tools like sliders, sort piles, images etc all help to keep the respondent engaged and more likely to complete a survey. The survey needs to be aesthetically pleasing and a positive experience for the respondent. Features like the autosave feature so the respondent does not have to start again if their computer crashes will ensure they complete the survey.
- **Reporting** – Reporting and analysis needs to be easy and allow you to analyse the data in one place. The tool should show you results in charts, graphs and allow you to look at the entire group of respondents, how they answered, the ability to cross tabulate, able to do counts, provide a summary of results, trending year over year.
- **Design and Ease of use** – Needs to be intuitive and easy to use, creating the survey needs to be easy. The tool should come with a library of templates for you to use so you do not need to start from scratch, and you should be able to customise to match your business branding (including colours, logo, multi languages, layout, style) allowing you to customise for your target group. You should be able to remove the 'powered by' footer and replace with your own URL.
- **Scalability** – Will this tool be able to grow with you as you grow, or will you need to move to another tool as you grow? Is the infrastructure scalable for growth? Can you use this tool for a number of different accounts/websites or do you have to create separate accounts for each one?

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2 – Multiple Users – The online survey should allow multiple users at any one time and the ability to share with your team.

3– Ongoing Support – Ensure you can get responsive ongoing support for your tool. You should be able to access via e-mail, phone, or live chat, as well as a knowledge database with answers so that you can find the answer yourself.

4 – Security – Ensure all sensitive data is encrypted competently. ISO27001 is a recognised standard for data and information. Check the tool has SSL certificates and there are daily backups of the database.

5 – Cloud vs On Premise –

- With a cloud version you don't need a server or technical expertise on your side – you essentially rent the use of a cloud based application. The survey results are usually posted to the hosting companies database. All the information resides on the vendor's server.
- With 'on premise' you own the software and it is physically hosted by you on your hardware. You have direct access to the servers and no recurring subscription charges, although you may need to buy upgrades, however, there are higher upfront costs. With this version the results come directly to you and all information resides on your server.

6 – Integration - Check the Online Survey Tool integrates with tools you use in your business including, your CRM, website, google analytics and other required apps.

7 – Due Diligence – Check the companies stability and reputation. Check reviews; what other users think, will give you far more information than the sales brochure of all the features. Request a demonstration and test drive a free trial.

8 – Value for money – When calculating the value for money ensure you are clear about what is included in the plan and what features are at an extra cost, there are a variety of pricing algorithms to look out for, with different limitations i.e. the number of answers you can collect in a month?, or the number of questions in a survey? number of user accounts with access? are there a maximum number of respondents? Ask what the billing period is, is it monthly, quarterly or annual? Could you pay monthly if you are uncertain and terminate contract easily? Ask if it is possible to upgrade and downgrade a plan and at what intervals.

9 – Ownership of Data – If the software and data is being hosted in a cloud environment, the ownership of data becomes more important. You should own the data. Ask the vendor if they will have access to your customers' data, and who retains the data when you leave the subscription.

10 - GDPR compliant – GDPR (General Data Protection Regulation) is a regulation in European Union law on data protection and privacy law, it also addresses the transfer of data outside of the EU. The tool will need to be GDPR compliant.