Engagement Surveys: Tips & Tricks

VPFO Communications & Engagement

Updated: January 2024

At UBC, **Qualtrics** is the primary tool for designing surveys available to all staff, faculty members and students. Users can login at https://ubc.qualtrics.com with their **CWL account** to access this survey tool. Please contact the IT team or visit the IT website for more information on setting up your account.

About

The **VPFO Communications & Engagement team** has created this resource guide to provide you with some **best surveying practices** to help support you from survey creation to data collection in Qualtrics. These insights and learnings are meant to enrich your data collection to help meet your survey objectives.

We have also created two surveys templates that will act as a benchmark to **assess customer service quality and satisfaction** by gathering feedback to help improve the VPFO customer service experience.

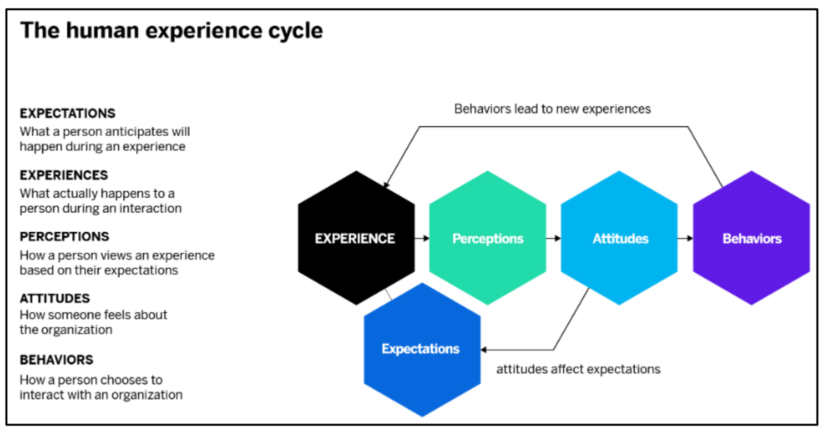
If you are looking to create surveys to **measure the customer service experience** of projects and services provided within the VPFO, please reach out to our team at communications@vpfo.ubc.ca to get support in setting up your customer experience survey.

Introduction

A survey can help you measure two types of data:

X-data, (Experience Data)

- X-data tells you **why** something is happening
- This information is collected from stakeholders to understand experiences from a human perspective. It's the data of how people **think, feel, and behave**.



Operational Data, (O-data)

- O-data tells you **what happened, when, where, how much, and who by.**
- This information helps us gather facts and information, for example:

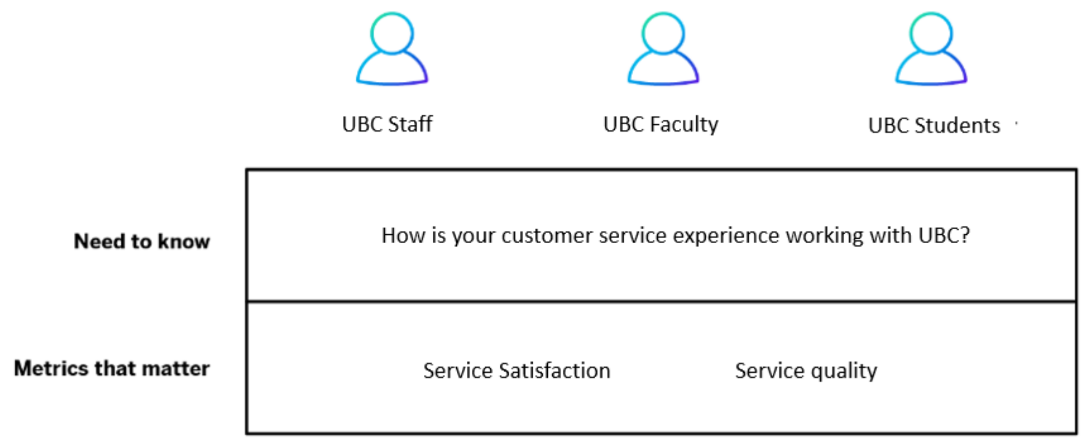
Demographic Data	Interaction/Transactional History	Identifying Information
Position Faculty Department	Application date Training Date Call history	Employee name / ID Email / phone number Vendor account

Planning & Designing Your Survey

Before you start designing and creating your survey, here are some things to consider:

1. **Identify your business problem /survey objective:**
   a. Some questions to ask yourself
      i. What is the goal of the survey?
      ii. What data do you need to measure?
      iii. What decisions do you need to make?
      iv. What metrics matter the most?
      v. Who are the stakeholders involved?

Sample matrix:



2. **Survey Design**
   a. Survey Length
      i. Keep the length of the survey short
      ii. Every **10 questions = approximately 2 mins** for a respondent
      iii. Customer experience surveys should take around **2-3 mins**

   b. Survey Structure
      i. Place your questions in an order that makes sense:
         1. **Screening** (do your respondents need to meet a certain criteria?)
         2. **Demographics** (helps identify your stakeholder group)
         3. **Main/Core Questions** (provides data to achieve survey goals)
         4. **Closing** (used to gain feedback & next steps)

c. Survey Questions

i. **Find the most effective question type for your survey**

Question Type	When to Use
Multiple Choice	Yes/no, true/false, drop-down list, one answer questions
"Select all that apply" Box (Allows multiple answers) **This option is under Multiple Choice section in Qualtrics*	When you want respondents to be able to pick more than one answer
Scale questions	A scale of strongly disagree to strongly agree Rating service questions (Excellent to poor)
Text entry box (Short text)	Open-ended questions, feedback, allows respondents to give other answers not listed or additional information

i. **Make your questions easy to answer for a higher response and survey completion rate**
   1. Limit open-ended questions as much as possible
   2. Limit complex questions (require too much effort to answer)
   3. Use multiple choice or "select all that apply" questions to decrease the resistance to answer
   4. Create "page breaks" in between sections

ii. **Be clear & direct in your questions**
   5. Avoid leading & biased questions
      a. Instead of asking "Do we always provide great customer service?", ask "how was the customer service we provided?"
      b. This helps to collect more unbiased and honest answers
   6. Avoid double-barreled questions (ask one question at a time)
      a. This happens when you ask for feedback on 2 separate areas.
      b. Instead of asking "How would you rate our reliability and efficiency?" in one question, separate into 2 questions
   7. Respondents likely skip questions they find confusing so use simple wording

iii. **Avoid wording such as "always", "most", "best"**
   8. Helps ensure quality of results is accurate
   9. Example: when you ask "Do we **always** provide the **best** service?", respondents would only answer "yes" if they thought the service was good 100% of the time even if the service was good most of the time.
   10. Randomizing the answer options also helps decrease biased answers

Survey Distribution + Data Collection

Before you decide to distribute your survey, here are some things in keep in mind, and please note that **if your survey is related to customer service experience, please reach out to the VPFO Communications & Engagement team at communications@vpfo.ubc.ca**

1. Preview your survey and ensure you test out the survey
    a. Check for errors, survey flow, question repeats, grammar, spelling…etc.
2. How do you want to distribute your survey?
    a. Which channel? (email, on website, in newsletter, through Qualtrics …etc.)
3. How long do you want to keep your survey active?
    a. How long do you want to give respondents who only completed their surveys halfway?
    b. What do you want to do with incomplete surveys?

Post Collection Results

After you collect your data, here are some ways to gather & analyze your results.

1. Results Reports in Qualtrics
    a. Gives you quick & simple visualization of your survey results
    b. You can customize what sections you want included in your report
2. Filter out garbage data
    a. Respondents who don't meet your screening requirements
    b. Incomplete answers?
3. Think about how you want to analyze your data

Qualtrics support has more resources if you want to learn more about data analysis, and reporting your results.

For More Support Get in Contact With:

- UBC Learning Technology Hub > Virtual Drop-In Support or Submit a Ticket
- Qualtrics Support Centre > Sign in with CWL
- UBC Brand Administrators or IT Service Centre > Help Desk Contact Form