



Survey Design & Data Analysis Workshops ~ ~ ~ Curriculum Coverage for Three-Day Live Event

Great Brook's Survey Design Workshop and **Survey Data Analysis Workshop** have provided in-depth training on the design and execution of survey projects for over two decades to thousands of people. The full three days of our live in-person classes cover the following topics:

A. Survey Practice Overview & Survey Project Management

- Definition of a scientific survey and key terminology
- Types of surveys: periodic (relationship), transaction-driven, one-time ad-hoc
- Key stages of a survey project and requirements of the project manager
- Factors that support success in a survey project
- Exercise: Examining a Statement of Purpose and how it drives the project flow

B. Survey Questionnaire (Instrument) Design

- **Questionnaire Design Elements**
 - Elements that comprise a survey instrument: Introductions, instructions, initiation, section headings, and closings.
 - How the elements affect the likelihood and the nature of the response
- **Questionnaire Design Process**
 - Steps required to create a valid, comprehensive survey instrument that addresses research objectives
 - Categories of questions: Attribute, attitudinal, demographic
 - Methods for identifying the attributes to measure on the survey instrument
 - Importance of pilot testing
- **Question Writing Principles**
 - General principles and concerns for question writing to help generate valid data
 - Types of instrumentation bias: ambiguity, double barreled questions, leading language, unreasonable recall, etc.
- **Survey Question Formats**
 - Review of the common question formats used in a questionnaire -- Interval rating, ordinal, categorical, open-ended – along with each type's design considerations
 - Interval rating scale design given special coverage
 - Approaches to measuring relative importance
- **Questionnaire Design Considerations**
 - General concerns for questionnaire construction: sequencing, grouping, flow, precedent setting, language level, routine, fatigue, requiring answers, etc.
- **Exercise:** Attribute identification to determine what questions to ask
- **Exercise:** Critique of a purposefully bad survey instrument

Are you a US government employee?

We recommend phrasing the request on your SF-182 as:
“Survey Design and Analysis Training Class.”
Approval for “workshops” is more complicated and difficult.



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C. Survey Administration

- **Survey Administration Modes & Biases**
 - Survey administration modes examining their strengths and weaknesses
 - Impact of mobile surveying upon questionnaire design
 - Administration biases to avoid
- **Sampling, Response Rates, and Statistical Confidence**
 - Review of sampling techniques
 - Explanation of sample size requirements and statistical accuracy
 - Techniques to increase response rates and reduce participation bias
- **Exercise:** Understanding sampling error
- **Exercise:** Group critique of attendees' survey

D. Survey Data Analysis & Reporting

- **Descriptive or Basic Statistics**
 - Data cleansing considerations
 - Basic statistics run on each survey question (all procedures shown in Excel): mean, mode, median, standard deviation, confidence statistic
- **Statistical Tests**
 - Statistical significance of a difference in survey scores over time or among groups
 - Measuring relative importance of attributes to an outcome measure, e.g., satisfaction
 - Pivot tables for generating demographic slices
- **Presenting the Findings**
 - Elements to include in a report of the survey findings
 - Proper use of graphs for each type of survey data
- **Exercise** (optional): Attendees are welcome to run the statistics on their own data sets.

Deliverables included with the Survey Design Workshop:

- Survey project plan with comprehensive task list and time estimates
- Survey sample size calculator: determine responses needed for a level of statistical accuracy
- Post-class consultation with Dr. Fred

Deliverables included with the Survey Data Analysis Workshop:

- Excel template to generate basic statistics for interval rating survey questions – for various scale lengths. (You'll need to insert the survey data and set up the cell ranges.)
- Excel template for Chi-square analysis
- Excel template for performing t-test for percentages (also known as A/B testing)
- Survey sample size calculator: determine responses needed for a level of statistical accuracy

Follow the link to our [Events](#) page for our latest schedule links for registration.



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Recommended Language for Application for Training

Here's some verbiage if you have to apply to take external training. Obviously every organization has different forms.

Course Title: Survey Design and Data Analysis Training Workshops

Purpose of Training: Learn the comprehensive skill set needed to conduct effective survey projects including the design of a valid, comprehensive survey questionnaire, administration of the surveys, and analysis of the data.

If you are a US Government employee:

Course Title: Survey Design and Data Analysis Training *Class*.

- "Workshops" require a higher level authorization, much the same as for attending "conferences." We learned this the hard way with one interested US Government employee.

Feel free to contact Great Brook if you need more assistance.



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About Great Brook & Dr. Frederick C Van Bennekom

Great Brook focuses on enabling organizational improvement through the application of stakeholder feedback. Great Brook's particular expertise lies in the customer service industry though we have broad exposure to all organizational types and functional areas. Great Brook offers a range of products and services, from books and workshops to custom consulting engagements to help clients' feedback processes. Great Brook has been delivering its survey workshops for 15 years, training over a thousand people in the US and overseas with recent classes in Johannesburg, Stockholm, Dubai, Singapore, and Kuala Lumpur.

Dr. Van Bennekom is Principal and Founder of Great Brook. Fred authored *Customer Surveying: A Guidebook for Service Managers*, and the *Support Services Questionnaire Library*, published by the Customer Service Press, currently in revision for a new edition. The Survey Workshop curriculum, also developed by Dr. Fred, parallels the teaching of the survey guidebook. Fred has created many surveys research studies used by service organizations for service program development, customer feedback, organizational feedback, and quality control purposes.

Dr. Van Bennekom is also a Lecturer at Northeastern University's College of Business Administration where he teaches Operations Management courses in the Executive MBA program. He has taught at a number of Boston-area business schools with a focus on service management and lean six sigma quality improvement concepts. Fred's business practice examines the use of feedback for organizational improvement, with a special focus on the strategic linkage between customer support and product engineering.

Fred co-authored a major research report on *Best Practices in Design for Supportability: Gaining Competitive Advantage from Customer Support*, with Keith Goffin of the Cranfield School of Management in England. As a co-founder of the First Wednesday Group, Fred produced roundtable forums for senior customer service executives in the Boston area and an annual Voice of the Customer Conference.

Prior to his academic and consulting careers, Fred served ten years as an information systems consultant for Digital Equipment Corporation's Field Service organization, developing management reporting systems for field management. He received his A.B. from Bowdoin College and his masters and doctoral degrees from Boston University's School of Management. Fred has published in both industry and academic journals with a paper currently under review that examines the impact of survey mode upon Net Promoter Scores. Fred is also a highly acclaimed speaker at industry conferences worldwide, such as Insights Middle East, HDI, DCI, CCA, Pink Elephant, AFSM, SSPA, TSIA, QATC, and ICMI.

Great Brook follows a very strict code of business ethics. We believe in honest, forthright relationships with our clients, vendors, and partners. In our business practices, we will not compromise those ethical roots. There is nothing we value more highly than our reputation.