



3 best practices for planning expert surveys

Learn to plan and target your survey like a pro

Creating a survey doesn't start with writing your first question.

It pays off to plan out your survey before you do anything. Be clear about its purpose, goals, and audience. It's not just about starting your survey out on the right foot. Planning your survey will ensure that it's focused, concise, and that it provides useful data.

Planning means more than just thinking about what types of questions you're going to ask. You'll save yourself a lot of trouble if you follow the 3 critical steps of survey planning:

- Map out your survey
- Capture the right audience
- Tailor your survey to their device

Map out your survey

Focus is critical in survey writing, and an unfocused survey will yield unfocused results. Before you start engaging your respondents, you should think about what you're hoping to get out of it before going into it. Try to set one key goal for your survey. It will help you brainstorm questions and structure your survey.

Let's say you own an ice cream shop and you want to collect customer feedback that will inform how you run your business. There are so many questions you could ask customers. Do you want to know about the quality of the ice cream? How satisfied customers are with your staff? The cleanliness of your store?

As you can see, there are a lot of approaches you can take and it's important you decide on one before you begin. What do you want to know? And why? **Here's an example of what your goal might look like if you're an ice cream shop owner.**

Goal: Get feedback from your customers to assess your shop's strengths and weaknesses so you can give customers an even better experience.

Use this goal as a guide as you write your survey question. With each question you add, ask yourself: "Does this help achieve my goal?" If the answer is no, it's probably best to save that question for another survey.

Ask yourself the big questions

Now that you've set your goal, you can use it as a baseline to answer the two key survey-design questions.

What: What are the questions I wanted answered? What do I want to learn?

Who: Who is my target audience? What demographic groups do I want to hear the opinions of?

Translate these questions into the context of your ice cream shop survey and it might look something like this:

What do I want to learn?

- How do customers rate my shop overall?
- What parts or aspects do they specifically like?
- Specifically what parts or aspects need improvement?

Who is my target population?

How do the above answers differ between each of the types of customer I have? In ice cream shops, there are generally 3 groups:

- first-time customers
- one-time customers
- returning customers

We're getting a lot closer now. We know what we want to know about whom. But we still don't know exactly the specific topics we're going to ask about. Let's break it down one step further to make sure we don't miss anything.

What do I want to learn?	Topic
How do customers rate my shop overall?	Satisfaction
Parts or aspects of my shop that customers like or need improvement	Flavor selection Ice cream quality Service Location Cleanliness Decor Price
How do the different types of customers who visit my shop differ in their opinions?	First-time customers Returning customers One-time customers

That's better. With an organized list of topics, we can be sure that we're covering all our bases. And by separating our customers into groups, we can ensure we're not overlooking anyone. Now choosing and writing your survey questions will be easy.

It may seem like a burden, but planning out your survey like this is really a good idea—especially if it's your first time creating a survey about this topic.

Capture the right audience

When you're sending out a survey it's always best to get as many respondents as possible, right? Not always.

If we're following the plan above, **we want to target a specific, relevant group of respondents—even if it means we have a smaller sample size.** For example, if you're looking for feedback on your ice cream shop, you definitely don't want responses from people who have never been there.

Much of the time, you can manually limit your sample size by simply being selective about who gets to take your survey.

If that sounds like challenge for your particular case, you can design your survey so that you only get answers from the respondents you want. Using what's called a "qualifying question" along with skip logic is great way to start.

For example, an ice cream shop owner might begin a survey by asking if the respondent has tried the shop's ice cream. If the respondent answers "no," you can use skip logic to send them to a page that thanks them for taking the survey or informs them that they're not eligible to take it.

Want to use advanced survey features?

Skip logic is just the beginning. Find out what other features you can get with a paid account.

[Learn more →](#)

Of course, you don't have to use it to disqualify them. Maybe they've visited your shop, but just haven't tried the ice cream. In that case, you can use skip logic to only skip the questions that have to do with ice cream.

In this case, it may be best to add multiple pages to your survey, separated by topic.

Qualifying question	Overall satisfaction	Ice cream quality	Store quality	Demographics
Visited shop	Satisfaction	Flavor Quality Price	Service Location Cleanliness Decor	First-time customers Returning customers One-time customers

With this type of survey design that's organized by topic, it's easy to disqualify respondents or let them skip to the part of the survey that applies to them.

Tailor your survey to their device

In the U.S., around 3 in 10 responses to SurveyMonkey surveys come from respondents using smartphones or tablets. That number is even higher outside the U.S., reaching 50% in some countries.

Bottom line: If you're creating a survey, there's a good chance at least some of your respondents are going to take it on mobile devices. How do you prepare?

Preparing for respondents on mobile devices can have a significant impact on how you should design it. In general, it means a shorter, less wordy survey design that avoids or limits certain question types.

Below are a few quick tips to make sure your survey is mobile ready.

Question types

✓ Multiple choice

The best option for a great mobile survey experience

- Keep question wording short
- Limit the number of response options to minimize scrolling

✓ Dropdown menu

Avoid using unless you have a lot of response options that can be ordered

- Order the answer options logically (e.g., alphabetically, numerically) making response options easier to find
- See how this question renders on a couple of different devices to ensure a good experience

✓ Open ended

Limit use to 1 - 2 questions per survey

- Be sure respondents can answer in a few words
- Keep in mind that results from open-ended questions can be more challenging to analyze

✗ Matrix / rating

Avoid using this question type—instead, break up the matrix into individual multiple choice questions

If absolutely needed, here are a few tips:

- Shorten labels to limit excessive text wrapping and scrolling
- The fewer the number of vertical answer options, the better

Sometimes it takes a little bit of forethought (and familiarity with your respondents) to decide how much you'll commit to making your survey mobile-friendly.

Are you sending a customer feedback survey to customers as soon as they walk out the door of your ice cream shop? There's a good chance they'll take it on a mobile device. Optimize your survey for mobile devices.

Are you sending a survey to employees at an office in the middle of the day? Since they're already at their desks, in front of their computers, they'll probably take it on a laptop or desktop. Mobile optimization might not be as important.

Think about how you're sending surveys, to whom, and when. If you understand these factors, you'll have a good idea for how much of a priority to make your surveys mobile-optimized.

Is your survey mobile ready?

Download our handy mobile surveys checklist to make sure every box is checked.

[Get checklist →](#)

Don't skip the planning phase of survey creation—it's a critical step.

Starting your survey with a plan gives you focus. It ensures you cover all the ground you need to cover, while keeping your survey concise and easy to take. It also means that you know exactly who you're targeting and, equally important, how you're going to reach them.

Ready to start writing?

[Get started](#)

