



BUSINESS RETENTION & EXPANSION

Survey Design & Implementation

Firm Selection



WHY USE A SURVEY?

- A survey can help to communicate the community's feelings of appreciation about its businesses
 - Taking time for the visit
 - Asking businesses' opinions about relevant concerns
- A survey can provide insight into the actions and initiatives that the community/task force/action team can use to address business-related issues
- A survey should help to build the community's capacity to initiate and sustain long-term growth as well as address the immediate and long-term concerns and needs of the business and the business community

I IMPORTANT POINTS

- The survey (also referred to as the “diagnostic tool” or “conversation guide”) is used differently in the volunteer visitor/paid professional models vs the segregated/continuous models
 - The volunteer visitor/paid professional models typically surveys a large number of firms in a short, specific time frame. Analysis is much more accurate when questions are asked in exactly the same manner.
 - The continuous/segregated models utilizes a different philosophy. A small set of firms are surveyed (or “diagnosed”) within a specific time frame, but these time frames are combined over a (probably) much longer horizon
 - These differences translate to a much different use of the diagnostic tool or survey instrument to achieve the desired result



USE OF THE INSTRUMENT/TOOL

- Recognize that there is not a single BR&E program within the continuous/segregated approach
 - A variety or blending of approaches must be used
- In a volunteer visitor/paid professional model, the survey instrument should be followed carefully
- In the segregated/continuous model, the instrument should be used as a guide to develop a conversation
 - Since one goal of the segregated/continuous model is to build a relationship with the company, an incomplete survey can be finished at a later date



■ IMPORTANT POINT

- It is important that each interviewer understand each question on the survey as well as each question's importance
- The survey questions should work together for a common theme and each question should contribute to the theme
- Make sure that each question provides ***needed***, not just ***wanted***, data
- If the interviewer doesn't understand the importance of a particular question, the team needs to determine whether that question is actually needed



OPTIONS FOR SURVEY DEVELOPMENT

- Use an existing survey
 - Executive Pulse, Bludot, Global Expansion Solutions
 - brei.org website
 - Internet
 - “Steal” one from someone/someplace else
- Develop one yourself
 - Difficult to do
 - Requires a great deal of time, effort, and resources



■ USING AN EXISTING SURVEY

- Since many in the class will be using an existing survey, let's focus on utilizing the survey instrument and response analysis
- A key factor in the success of the survey effort is to understand the question and why it is being asked
 - This includes having an understanding of how a specific question relates to the rest of the survey instrument
- Developing this understanding will increase the respondent's confidence in your ability to understand the response

DEVELOPING A SURVEY INSTRUMENT

Caution should be used when adopting another organization's survey instrument



- Does the survey fit the targeted business sector?
- Are the questions relevant for your geographic or political area?
- Has the survey been tested for validity with ***your*** businesses?
- Does the survey pose the questions that you need answered?

DEVELOPING A SURVEY INSTRUMENT



- Developing a survey instrument from scratch is complicated
- Question identification is key
 - Does the question address the targeted business sector?
 - Can the question produce credible information?
 - ***Can*** and ***will*** the respondent answer the question?
- Operationalization – asking questions that provides data that can be meaningfully observed or measured
 - Facts versus behaviors versus beliefs
- The instrument should be tested (several times) for validity (perhaps use AI for the initial tests??)



INTRODUCING BIAS INTO THE SURVEY

- Even if you use a pre-determined instrument, you can introduce bias into the effort
 - Asking questions in an emotional way
 - Using inflection in asking the question
 - Changing the order of the questions
 - Interpreting a question to some respondents and not to others
 - Sharing a different interpretation with different respondents
- While it may be difficult in the conversation, try to ask the questions in as consistent a manner as possible



I QUESTION SPECIFICITY

- While most questions on the diagnostic tool will be close-ended, you have the opportunity to add questions
 - ***Question specificity*** refers to whether a question is open-ended or closed-ended
- *Open ended question*
 - What effect will the current economic crisis have on your workforce?
- *Closed-ended question example*
 - Will you likely hire additional workers, reduce your workforce, or maintain the same workforce level over the next year?



CHARACTERISTICS OF OPEN-ENDED QUESTIONS

- Easy to write
- Not easy to answer
- Produces very different types of responses that are not always consistent across the sample
- Not easy (perhaps impossible) to analyze
- Difficult to write (well)
- Easier to analyze
- Limits responses (both good and bad)
- Can have both ordered and unordered choices



SURVEY DESIGN POINTS- FACE TO FACE SURVEYS

- No need for the survey to necessarily **look** good
- It **is** necessary for the survey to **sound** good
- Keep question short and simple
- Ranking items by the respondent is very difficult
- Introduction of the interview by the interviewer is necessary
- Use transitions, fillers, lead-ins to indicate that topics will change
- Remember that the respondent only sees the survey if a copy is provided
 - This is a good idea, but a copy must be provided
 - Usually reserved for the volunteer visitor model approach



SURVEY DESIGN POINTS- INTERNET SURVEYS

- Typically used as an introductory effort to identify issues
- The survey must **look** good
- The survey must be kept short; attention spans are not long
- Questions must be very clear to the respondent (the survey should be tested exhaustively)
- Keep questions short and simple; closed-ended questions are easier to answer (and analyze)
- The process of ranking items is less difficult
- Allow the user to exit the survey and pick up where they left off – this allows research into complicated issues



SURVEY DESIGN POINTS- PHONE SURVEYS

- While many BR&E programs use phone calls to maintain contact with businesses, attempting a formal survey effort over the phone is usually not a good idea
- A phone survey (especially if it is a cold call) could be viewed as a form of telemarketing
- The interviewer should expect superficial answers to only one or two questions – adopt a conversational approach
- Open-ended questions are probably the best for a conversational tone
- Don't use multiple option or ranking questions



SURVEY DESIGN POINTS- NEWSPAPER SURVEYS

- Some programs have used a short survey in the newspaper to introduce the program to the community and gain an idea of overarching issues
- This effort could be viewed as trivializing the program
- Survey must be kept short
- Questions must be very clear to the respondent (the survey should be tested exhaustively)
- Keep questions short and simple; closed-ended questions are easier to answer (and analyze)
- Conducive to answering multiple-option questions
- Ranking items is less difficult



■ FIRM SELECTION

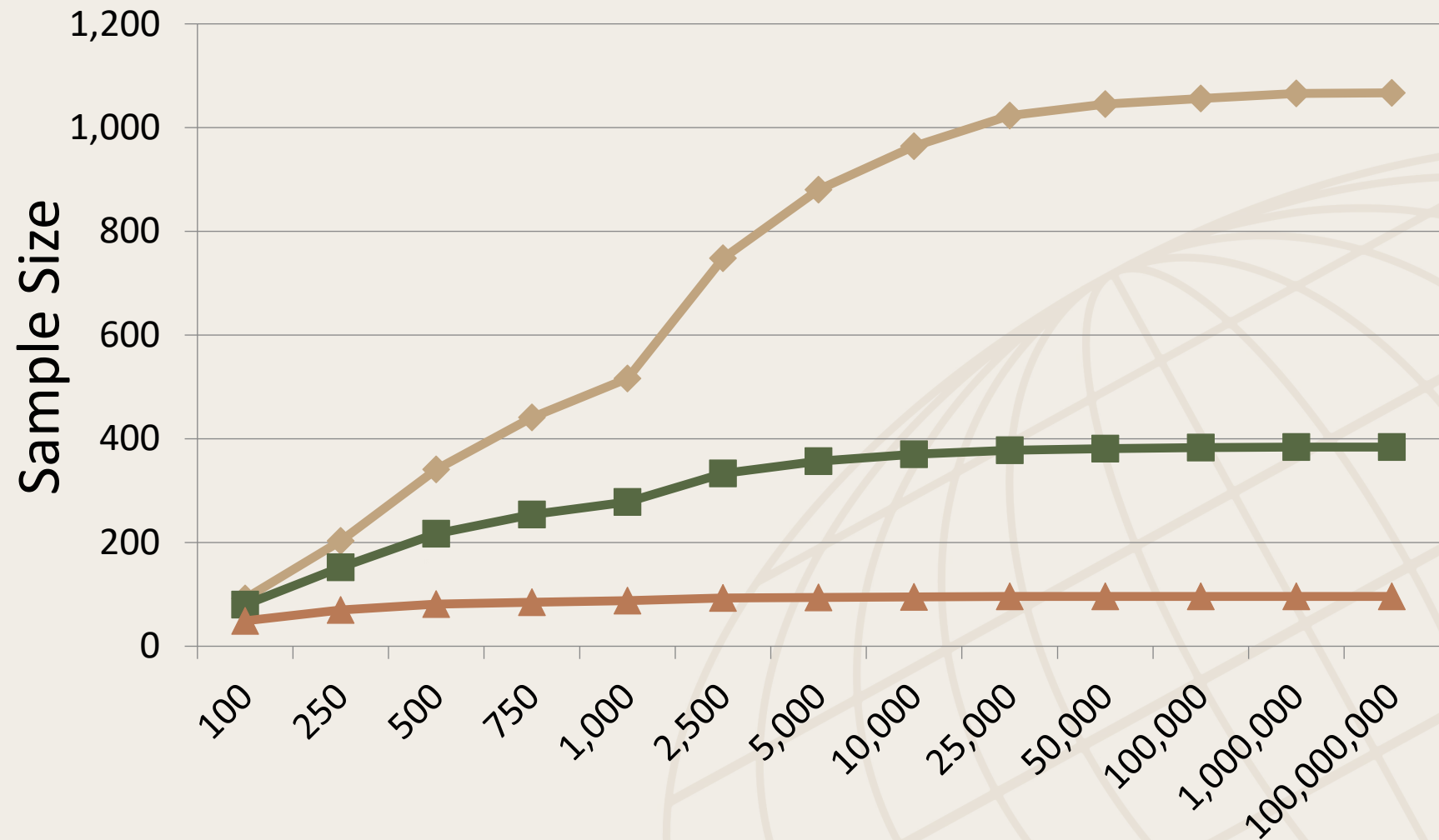
- Industry/sector should be identified at the beginning of the program
- Often difficult to combine industries/sectors
 - Metal fabrication and retail sales have different issues, needs and concerns regarding customer base, workforce development/education, infrastructure, etc.
- Once the industry/sector has been identified, the major sticking point for many BR&E programs is **sampling**
- **Sampling** is the method of choosing a select number of firms from the population so that analysis results can be generalized to the population



■ SAMPLING ISSUES

- Do you really need to sample?
- A sample should obtain information from a few respondents to generalize to a population
- If the population is small, you may want to survey the entire population
 - If the **business** population is 250, then the number of respondents would need to be 200 for a valid sample
 - The marginal cost of surveying the additional 50 businesses would presumably be fairly low
- Online sample calculator: <https://www.surveysystem.com/sscalc.htm>

SAMPLING SIZES



QUESTIONS





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