

THE SURVEY AS CONVERSATION

Survey Creation Worksheet

WHY

The purpose of this survey is: _____

WHO

Define your target audience: Whom should you ask? Existing clients, potential clients (prospects) or both?

WHERE AND HOW

Where are you most likely to encounter your target respondents? (Check all that apply)

Email

- Opt-in list
- Individuals you know

Social Media

- Facebook (Friends & Likes)
- Twitter followers
- LinkedIn connections

Websites

- Your website
- Fellow members of associations
- Visitors of other sites in your niche (or related niches)

Other _____

How should your survey be delivered? (Remember, this depends on where you encounter your targets)

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WHAT

What do you want to find out? List your topics:

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

WHEN

When do you want to send the survey? _____

When do you want to close the survey? _____

Do you want to send a reminder? If so, when? _____

AND...

Should the survey be anonymous? Yes No

Do you need to collect demographic data? Yes No

If Yes, list (Age, gender, etc.) _____

Do you want to provide an incentive? If so, what will you provide? _____

What follow-up will you provide? _____