

# Survey Fielding Steps

1. Complete Survey Programming and review
2. Secure Sample
3. Invite Respondents
4. Manage Survey & Quotas
5. Preliminary Cleaning of Data
6. Send incentives to respondents

Core Skills:

URLS

Mail Merge

Writing - Messages / Email Invitations

Analysis (Data Cleaning only)

Sample Selection

# URLs

http:// server.domain.com / path

protocol                      domain.  
(server name)                      folder.

/file.html?parameter1=value&...

file / Program.

Parameters

## Sample Selection

This is the last time you  
can make sure that your  
survey is representative !

## Census Match.

Ask your panel provider  
to census match the sample.

This request has the panel  
company ensure that the  
demographic characteristics  
match the general population

# Side Bar:

## Over-Sampling:

Collect more responses from  
a specific sub-population

?

# Survey Fielding Tasks

- Build Respondent Pool
- Pre-screen Respondents
- Build Survey Invitations
- Send out Invitations
- Manage unsubscribes / List.
- Field questions / Problems
- Pay incentives
- Prevent being flagged as Spam.



Two Sources -

List -

Panel -

Compare & Contrast.

## Lists

Lower / Slower Response Than  
Panel Companies

More Limited Population

(Sampling is really hard w/  
Lists.)

Can reach specific populations  
that are hard to reach w/  
a panel.

## Incentive Choices

- Lottery
- Guaranteed Honorarium
- Nothing
- Others you have seen?

Panel Companies usually

handle:

- Pre screening
- Inviting Respondents
- Paying Incentives
- Managing Unsubscribers / Panel aspects

- Spam detection / monitoring

\* More expensive.

# Panel Companies

- Create and Send out invitation -

(often respondent goes to panel site → Survey → panel site.)

- You need to dynamically define the url to pass back to panel company

# Panel Book

This is a description of the panel and its make-up

Most importantly, it lists all the information panel companies have collect on panelists that can be used for pre-screening.

Analysis Quality can be  
influenced (ruined) at any  
point in the process.

1st order of business

Check data for quality

Report to Panel Respondents  
you want keep and use.

- 1) They want to sell you
- 2) They need to credit respondents



# Monitoring Data.

Don't pay too much attention  
to data patterns during Soft-launch  
& monitoring

Remember Pennsylvania.

## Soft Launch.

- Timing
- Speed of response.
- Monitor quotas.
- Monitor open ends & distribution.