

The Rubik's Cube, A Significant Challenge - Designing Effective Surveys

Preface: This is the eight in a series of eight articles on issues of importance to the management of organizations and the leadership of people. The first article created a Management “Jambalaya” using various ingredients - “leftover” ideas that still have application in the world of people and work. The articles that follow will use the same series of ingredients and a “fresh” approach to create an entrée – nutritious food for thought.

Disclaimer: Since this is the last column in a series of eight and since I believe in “truth in advertising” and “full disclosure” I must confess that the ideas that follow are driven by my scar tissue, not my brain tissue. This is to your advantage because my scar tissue is much better developed.

In my opinion, brain tissue is about your head, academic study, and sitting on your butt and being taught, while scar tissue is about one's heart and soul, experience, falling on your butt and learning a lesson, and most importantly of all – standing back up after you fall. I believe scar tissue is more important because it's living life – not learning about life. Life is the toughest teacher; first you're given the test and then you get the lesson.

I was once speaking with a group of bankers regarding the cultural differences between banks and insurance agencies. I explained that my experience came from failing to bridge this cultural gap in one organization.

One of the bankers asked, “why should we listen to you – you've admitted you failed once?” For a second I froze and then as He so often does, God gave me an answer. I stated simply, “how much would you pay someone to get cancer for you?” The banker became quiet and listened carefully. I believed then and I believe now, we learn more from failure than from success and if you can “piggyback” someone else's failures (scar tissue) you can be saved from having so many of your own.

If you want science and guarantees don't read this article. Go find a marketing text. If you want some to be provoked by a seasoned veteran of the marketplace, read on!

The Ingredient / Entrée – Designing Effective Surveys

Do you remember the Rubik's Cube? If memory serves me correctly, it flooded the marketplace at Christmas about 45 years ago. It was the “cool gift” of the year.

If you've never seen one or if you've seen one and didn't know what it was called, I'll attempt to describe it. It was a simple cube with 9 squares on each of its six sides. When you picked up the cube initially, each of the 9 squares on each side was the same color. Each side was a different color. What happened next was the challenge. As you rotated the cube in any direction the colors mixed. The challenge then became to “straighten” it up – return to six sides each with the same color.

It was a difficult task. For a few mechanically gifted souls this was doable. For the rest of us mortals, the task was impossible. The more you twisted the cube the more diverse the mix of colors. Millions of hours of time and dollars productivity for this country as a whole were lost during the months following the introduction of this simple puzzle as we spent countless hours trying to “figure it out.”

A friend out of utter frustration once lifted off the 54 individual color tabs and reapplied them to successfully work the cube. He could never do this the correct way but it was satisfying for him to deceptively show us his accomplishment.

If you are familiar with the cube you totally understand the above paragraphs. If you’ve never seen or played with this “toy”, you will never understand the challenge. So what does this game have to do with designing efficient surveys? Nothing or maybe everything.

In the past businesses served “mass markets”. Although the individual members of these “mass” groups differed in terms of age, economics, gender, and race there was no expectation for “tailor made” products. The only possible exception was the wealthiest members of the “mass”. Even they had limited expectations for customization.

Occasionally manufacturers would narrow the “mass” based upon market segments by age, economics, etc. but this was just dividing the “herd” into smaller “pens”.

Because of this there were a few competitors. All of whom shared success and profits by selling similar products to the general public. There was limited information available to consumers. Most of this information was controlled by or filtered through product manufacturers and distributors or providers of service.

Today, the game has changed. We’ve joined a global market that is the most competitive anyone has ever seen. The Internet has provided every person access to full information on any product or service. This has resulted in a new “sophisticated” consumer. This new consumer, armed with information is now able to shop from an unlimited number of sources in a global economy. **THIS, SIMPLY STATED, IS A POWER SHIFT.**

Yesterday manufacturers, distributors, and providers were in charge. Today consumers have the power. Yesterday we were happy being part of a mass market – today we are individuals who demand “mass customization.” We as individuals are now a niche of one.

Yesterday it was only necessary to know about the “mass”. Today you must know about the individual. Remember the Rubik’s Cube and it’s 54 sides. Well the new marketplace has over 280 million INDIVIDUALS. **THIS IS THE CHALLENGE.** To compete in tomorrow’s world every manufacturer needs to know the individuals they serve not the faceless groups these individuals belong to.

This is not just about knowing ABOUT the customers; this is about KNOWING the customer. Thus the importance of surveys and their redesign – this about surveys in the broad sense – marketplace / competitive intelligence. Your need is for better – more intimate – information. This is more about intelligence than just data.

Webster’s Ninth New Collegiate Dictionary offers the following:

survey vb 1 a : to examine as to condition, situation, or value : APPRAISE b : to query (someone) in order to collect data for the analysis of some aspect of a group or area

survey n : the act or an instance of surveying

The following rhetorical survey and proposed response might provide you ideas and motivation on the why, how, who, what, and when of the process. If you want to learn more review the marketing textbooks mentioned earlier. Understand this is a “cliff notes” of the process. This is not intended to be a conclusive report.

Why survey?

You need to know your customers and prospective customers. A survey will get you data, that can be sorted, developed, and organized into information to create intelligence that when properly applied will result in knowledge and this then can be converted to RESULTS.

How survey?

There is no one way to survey. There are national, regional, and local market research organizations that are ready, willing and able to help. You can contract with a graduate student from a local college, study some local market intelligence obtained through local media outlets, research on the Internet for studies of your customer / prospect base, hire mystery shoppers, conduct focus groups, contract with a consultant for “boots on the ground” intelligence, etc.

When survey?

Although one survey is an “event” in terms of a timeframe, specific target audience, questions asked, and inquiry format (telephone, snail mail, e-mail, personal interviews, focus group, etc.). Consider surveying as a most important process in your organization not an “event”.

A specific need may trigger a reason for a focused survey – a new product to be introduced, a planned merger or acquisition, a new competitor, etc. The reality is that you never want to take your organization’s “ear from the ground” or “finger off the pulse” of the market.

The act of “asking” questions and engaging in dialogue is critical. The act of listening is more important than talking. Teach your employees to engage your customers and prospects in dialogue. Have them listen to community leaders, competitors, friends, family, etc. Often you (they) can learn more about your own “shop” by talking to people who don’t know you or know what you do.

Who do you survey?

Your customers and prospects and the customers and prospects of your competitors are your primary targets. Obviously there is considerable overlap in these groups. The process of learning should not be limited – question, listen, and learn from everyone – competitors, regulators, the media, cartoons, your employees, legislators, family, children (“out of the mouths of babes”), etc.

As mentioned don’t limit your study of customers to merely their age, economic status (white collar, blue collar, etc.) and gender. Consider their lifestyle, life stage and life condition. In this microcosm of the nation that is Louisiana we have Cajuns, Creoles, Rednecks, Uptown New Orleanians, and other groups definable by their lifestyle. Cajun and these other groups are as much an attitude as ethnicity.

In terms of life stage you can dissect individuals and couples over age 55 into many narrower groupings. Some of these groups are retired, some are rehired - into a second or third career, some are parenting their children at home, some have empty nests, some are sandwiched between parents and children, etc.

In terms of life condition recognize an individual’s world can change in one day. Christopher Reeves was a healthy, active movie star, athlete on one day and the next day he was a survivor of paraplegia.

What do you ask?

Consider asking (in addition to who they are [demographics] and how and why they buy [psychographics]) what do they want and need, what are they willing to pay, how do they want to have this product or service delivered, etc.?

Where do you ask it?

Obviously formal surveying will dictate certain methods, territories, formats, and audiences. Beyond these efforts, constantly survey – ask / listen. Engage people in conversations whenever and wherever you can. Don’t target them for your reasons – target them for the purpose of knowing them better.

Many years ago, a Stock Brokerage company had a most effective Television ad. The satisfied customer was explaining to a friend that his “house was in order” – his unique needs had been met by this Broker. The friend asked in amazement, “how did they know?” His simple response, “THEY ASKED!” I suggest - JUST ASK!

