

BOB KRONE NOTES ON SURVEYS, QUESTIONNAIRES AND RESEARCH METHODS

Surveys and questionnaires for academic research fall into one of the following categories which are not necessarily mutually exclusive:

- Qualitative surveys (after ideas or judgments)
- Quantitative surveys (after numbers of responses in a category or comparative responses to alternatives)
- Surface mailed surveys (the traditional mode)
- Computer based online surveys using e-mail or web sites
- Face-to-face verbal interviews
- Open-ended questionnaires where respondent is asked to search their experience and knowledge for answers.
- Rensis Likert type surveys asking to scale responses to A statement or question (*e.g.* "1 = disagree or reject to 5 = fully agree or accept")
- Political issues surveys where respondent indicates "Favor" Or "Oppose" to a set of campaign issues or may select priority Judgments about issues and problems. (Note: "polling" as done by Gallup, et al, is rarely done by individual researchers but can be used as secondary research data).
- Guest or customer satisfaction surveys for hotels, restaurants, shops or for quality of products or services.
- Forecasting Surveys asking for relative importance of a set of two related Policy choices

I have not recommended traditional mailed surveys or questionnaires to advance degree candidates for several years now. The reason is that I believe they are becoming less credible and viable as the digital age matures. They are costly in time and money and becoming obsolete. I haven't found any professionals for several years who *"enjoy answering questionnaires."* In fact an increasing percentage of solicited respondents will not respond which introduces a bias into the data. Since professionals today do their work with computers they are more comfortable, and more willing, to respond to online surveys than traditional mailed ones.

There are exceptions to those drawbacks of traditional surveys related to the subject and how the focus group population is formed, so when candidates want to use mailed surveys or questionnaires I encourage them to do so, but not as the only primary research data source. Then I

ask them, when their degree work is done, to do a comparative judgment of the effectiveness of the survey tools they used.

I have an additional caution about Likert style surveys. They can produce some useful data, but their weakness is that they solicit opinions/attitudes on a scale of "*I like*" to "*I dislike.....*" rather than ideas for improvement. And when you have that kind of a database it is always about "*what exists as stated by the question or statement of the survey*" rather than "*what my knowledge and experience tells me could be/should be done to improve.*" And in Business and Management research is always looking for improvement outcomes. It's a fundamental at both the masters and the doctoral levels. The data from Likert style surveys tends to be value judgments rather than "*a set of prescriptions for leadership*" -- which is my definition of theory for business and management. So, I always recommend to people using traditional surveys to add open-ended questions that ask respondents to think prescriptively about the subject.

There are some other basics about questionnaire and survey design that can, if used, make them more effective:

1. They should be short .. multiple-page surveys stay at the bottom of the executive in-box or are discarded.
2. You want to gather "*raw data*" that you, the researcher, then analyze. Do not ask respondents to solve your research hypotheses or to do your analysis. The simplest way to think about raw data is that it should be a mix of problems, and solutions to problems, as viewed and judged by the respondent in their business and management environment and from their experience.
3. Do not use ambiguous, theoretical, academic or fuzzy terms or phrases from which you expect respondents to provide you good data. Their definitions for those terms and phrases are likely to be different from yours which will interject doubts about the validity and usefulness of the data obtained.
4. Be careful about your assertions flowing from the survey results. It is an erroneous assumption that all respondents have the experience, knowledge and forecasting abilities on which to base their judgments. I personally have always been skeptical about the claim, for instance, that "*1,252 adults polled by telephone on the U.S. Presidential election equals the judgment*

of "Americans." Variables impacting the validity of respondents' survey answers are: 1) Design of the question; 2) Pressures from superiors or peers; 3) Most recent personal experiences; and 4) Recent media coverage. And remember that the assertion that results are "97% accurate" means that the methodology, if repeated, has a 97% probability of producing the same results – not that the answers are necessarily valid or useful for policymaking. The more complex the subject (e.g. Social, political, cultural issues) the more skeptical you should be about the results.

I should qualify these reservations statements by pointing out that many of them apply primarily to the usefulness of qualitative methods data for strategy or policy or decision making. There are strictly quantitative surveys that are used successfully for marketing, sales and forecasting. The best qualitative group survey method available is Ideas Unlimited. For the description, theory and applications of that method see Dr. Bob and Sue Krone, 2007, *Ideas Unlimited: Capturing Global Brainpower*, Infinity Press and Amazon.com

My final recommendation for those doing advanced degree research is never to rely on the data obtained from one survey method for your findings, conclusions and recommendations of your study. The ancient navigation principle of "*Triangulation*" (fixing your position from sightings on three stars) applies, and many of the methods packages of my masters and doctoral degree candidates use more than three data sources to justify their findings.

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