

Five Steps to a Successful Survey



1 Creating a New Survey

Go to **incquery.com** and click **Register** (if you need to create an account) or **Login** (if you already have an account).

Click **Create Survey** and enter the required information. You can start with a blank survey or ask the IncQuery team about using a pre-built template as starting point.

Important! Each survey requires its own password, which is different from your user account password. As a security precaution, this password can't be changed later or retrieved if lost.

Add internal team members by clicking the **Manage Users** button in the top right corner.

Select the **Overview** tab to define your target sample sizes. You can do this yourself or ask your survey directors to do it for you.



What If I Have a Word Document?

Ask your survey directors to import the initial Word document. Once imported, you can continue working on the survey in the IncQuery platform – there is no need to update the Word document.

It's always best to start your survey in the platform. It saves time and provides more authoring functionality. If you need to share the survey in Word with someone, you can easily export a preformatted survey document.



What Should I Do Before I Start Writing Questions?

Before authoring, determine your research objectives, including target audience, sample size requirements, potential data cuts, and ideal timeline. Many teams schedule kickoff calls to clarify roles and deadlines.

2 Authoring and Collaborating

Select the **Content** tab to begin drafting your survey.

- Click **+** to add a question, page break, header, design elements, or functionality.
- Within each question, use the drop-down menu to change the question type.

Use comments and **@tags** to collaborate with team members and survey directors.

- Tag your survey directors for any real-time programming requests.
- You can also tag your survey directors if you have questions about survey design, proper question types, and other best practices.



How Does Data Collection Work?

For each survey, you'll need to engage one or more panel providers to help you reach your target audience. Simply connect your survey directors by email with the provider or providers. You don't have to configure anything in the platform.

If you need help selecting a panel provider, the IncQuery team can provide guidance. We can help coordinate panel estimates on your behalf as well if needed.

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3 Reviewing and Testing

Select **Export to Word** to download a preformatted survey document if you need to share it with internal or external stakeholders not using the IncQuery platform.

Select **Preview** to see and test your survey. You will have a testing link to share with others.



What Should I Look for While Testing?

- Does the survey display properly on both desktop computers and mobile devices?
- Does the survey work for all possible responses and pathing scenarios, including edge cases?
- Are there typos or grammatical mistakes?
- Are the questions easy to understand?
- Are the questions free of bias?

4 Launching

Ask your survey directors to start a Soft Launch with about 10% of the total sample size or 100 responses (whichever is less).

The Soft Launch lets you test the survey in real-world conditions with actual respondents. This lets you ensure everything works properly and determine if you need to tweak the content. This data counts toward your total responses.

After you've reviewed the initial results and require no additional changes, ask the survey directors to initiate a Full Launch.

After launch, monitor statistics on the Metrics page under the Results tab.

5 Exporting and Analyzing Results

Export your live data from **Download** page under the **Results** tab.

Analyze your data directly in the platform on the **Download** page under the **Results** tab. You can easily cut and segment the results.



What Data Format Do I Need?

Most teams prefer to download a wide file in Excel format, which puts each person's responses in a separate row, with the columns corresponding to questions and answer choices.

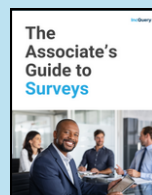
You might need to download a different format if you want to import your dataset into an external analysis or visualization tool.

Additional Resources

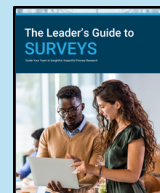
In-Platform Resources

- Reach out directly to your survey directors.
- Visit the **Knowledge Base** (look for the link at the top of the dashboard).

Guides (Click to Download)



[The Associate's Guide to Surveys](#)



[The Leader's Guide to Surveys](#)