

Solutions

By Erin Whitaker

Innovate and Change with Surveys



We all try something new and different at some point in our business life. When we do, one of two things will happen: It will be successful or it will fail. The unknown of will it work or not work makes change with innovation scary. Innovation can encompass a large project or a small change in your service, but regardless of the magnitude, it is still a change.

For some, this fear turns into adrenaline and excitement that propels them to leap forward and just go for it. For others, fear turns into anxiety and stress, essentially paralyzing any progress. For most of us, our reaction is somewhere in between. However, the important question for all is how can we successfully transfer that idea into action?

One of the most powerful resources we have at our fingertips to help us decide whether or not to move forward with an innovative change is a survey. A survey will give us a sample of facts, figures, and opinions. When done right, it will tell us what our consumers want, how they want it, how they will use it, and even what price they will pay for it. We simply have to know how to use the information.

The mechanics of a survey are: ask questions, get answers and analyze results. There may be differences in why and how surveys are used, but

the mechanics are basically the same. I classify surveys into two main categories:

1. The repeat survey
2. The single-use survey

Both are important tools for making management decisions. The repeat survey is administered at regular intervals and asks the same or similar questions each time it is sent. The family follow-up survey is a good example of a repeat survey that most of us are familiar with. It asks a standard set of questions about your funeral home, merchandise and services received. It is generally administered within two weeks of a service. Other examples of a repeat survey are the annual National Funeral Directors Association's Consumer Awareness survey and the study the Funeral and Memorial Information Council conducts every five years.

The information gathered from repeat surveys is twofold. First, we see where respondents are today



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relative to the questions asked. Second, since we ask the same questions each time, we can compare responses from one time period to another. In essence, you get a snapshot of opinions today but can also look for trends to see if

consumer opinions are changing.

A repeat survey provides good management information for changes you may like to make in your regular course of service. At The Foresight Companies, we often work with a funeral home owner on merchandising strategies so he or she can offer the right products at the right price points to meet consumer needs. For example, we may find that the physical showroom is too small or located on an undesirable second floor or the basement. Does it make good financial sense to do the necessary upgrades? For some, a virtual showroom concept may provide a solution. It offers more products but without the added costs of adding or renovating a room. But what will consumers think?

If you survey consumers and you ask questions such as, “Was the selection of available merchandise sufficient to meet your needs?” “Was the price of the merchandise as expected?” “Were you satisfied with the overall merchandising process?” you can compare the before-change and after-change results. If the responses indicate more satisfaction after a change was made, then it was a success. If satisfaction drops, then something was not done right in the changeover. The good news is that you now have the information directly from your families, and you can continue to adjust your merchandising until you are as good as or better than the “before innovation” results.

The second type of survey I refer to is the single-use survey. This is typically a project or feasibility survey, designed to address questions about a single idea and generally administered for a set duration. Often these surveys are used when looking to make facility additions or adding new services such as catering. The “if you build it they will come” attitude is good for “Field of Dreams” but not good for major business decisions.

Sometimes you get lucky, but too often, despite best intentions, luck is not the case. The project survey is critical to providing the voice of the customers. Will they use it? How will they use it? What price points would they consider reasonable? At The Foresight Companies, we use this survey to help us decide if there is interest in a particular seminar and if so, what are the main topics people want to learn?

Surveys work because people want to share their opinions with you; they want to know they are a part of something. In NFDA’s 2014 consumer awareness study, more than 80 percent of respondents said they would be willing to provide feedback. Today, with technology, it is easier than ever to send out surveys and get the immediate results.

However, surveying for the sake of surveying will not provide you any more guidance than trying to read a crystal ball. The survey only adds value if the right questions are asked, in the right order, and of the right respondents. When creating surveys you have to be aware of leading questions, uneven scales, risks of omission, asking multiple questions in one question and a variety of other opportunities for error. Here is where we restate the proverbial “garbage in, garbage out” mantra. The key to successful research is making sure the right questions are asked, in the right order, with the right answer choices available.

Knowing how to interpret the response is as equally important as asking the right questions. Often we look at the responses in aggregate, which is a good starting point. However, you have to be open and let the data lead you, and that comes from looking deeper into the responses. For example, let’s assume you are considering adding a reception area. You send out a survey and ask the question,

“Would you use our funeral home for a reception following a service?” The overall response is that 35 percent would consider using your funeral home for the reception following the service. What decision would you make?

What if we analyze the responses based on age? You find that for those 46 to 55 years of age, 80 percent responded favorably to using the reception center after a funeral service. Would you make a different decision?

Perhaps you still do not have a clear answer, so you are starting to look at the responses from families who have used your funeral home and families who have not used your facility. The key to the analysis is more than just reading the responses. You need to have the appropriate follow-up questions and look at your responses in different ways in order to validate the results and make the right decision.

When it comes to innovation, it can be scary and exciting. Do not let those fears stop. Maybe just pause and consider more data before you move forward strategically. I fully believe that any good decision is composed of data and guts. You have to start with the data. What information do you currently have and what information do you need in order to make a sound decision? Surveys give us the critical voice of your consumer, that all-too-often missing piece of data. Armed with good information, and a little bit of guts, you become the innovative leader you aspire to be.

As I work with clients, talk with colleagues and walk exhibit floors, there is no doubt in my mind there are numerous innovative concepts in funeral service today. I wonder how many people used surveys as part of their planning process. It will be interesting to see how many are successful and how many are not. Hmmm, sounds like a good idea for a survey study in and of itself ... •