

THE GLOBAL BENCHMARKING COUNCIL'S  
**INTERNET BENCHMARKING EXCHANGE (IBE)**  
**SURVEY GUIDELINES**

The **Internet Benchmarking Exchange (IBE)** is a cooperative survey service between GBC member companies and Best Practices, LLC. Within a four to six-week timeframe, Best Practices LLC can turn your business questions into insights from other organizations that face the same issues.

The IBE service includes:

- Survey Guidelines to assist in developing draft surveys
- Interactive consultation on your draft survey questions
- Online posting on [www.globalbenchmarking.com](http://www.globalbenchmarking.com)
- Email distribution to target groups
- Survey analysis in PowerPoint slides
- Opportunity to conduct post-survey knowledge exchanges with respondents

These **Survey Guidelines** contain detailed descriptions of the IBE service, including:

- A) IBE Policies
- B) Survey Process and Timeframe
- C) Topic and Question Development Guide
- D) Survey Request Form

## **A) IBE POLICIES**

### **Survey Allowance**

Depending on contract terms, most GBC member companies may initiate at least one survey per year. GBC member companies may initiate additional surveys for a discounted fee of **\$7,500**, 25% off the non-GBC company price of **\$10,000**.

### **IBE Survey Code of Conduct**

In the spirit of partnership with Best Practices, LLC, survey sponsors are asked to:

- Follow these Survey Guidelines to develop a well-designed draft survey
- Complete their own survey, providing the same type and level of information as is to be received by participating companies
- Be honest, accurate, complete, and forthcoming with information in survey development and on the survey
- Distribute and use exchanged information to make improvements

### **Survey Findings and Results**

Distribution: The survey sponsor and all survey participants will get a copy of the PowerPoint analysis slides.

Confidentiality Assurance: All company data are blinded in the charts and analysis slides and cannot be associated with the survey respondent or organization.

Data Disclaimer: Sponsors should understand that responses do not necessarily reflect the global organization. Sponsors generally use survey analysis as “guiding research” which is often one of several information streams used to inform a decision.

Intellectual Property: Survey analysis and data are archived in the Best Practice Database, which is available 24/7 to GBC members. The published findings, analysis, insights, and executive summaries are the copyrighted reports and intellectual capital of Best Practices, LLC.

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B) SURVEY PROCESS AND TIMEFRAME**

The survey development process starts with your Account Manager. Your Account Manager can help you determine whether the IBE is the right channel for your business question or whether it can be better addressed through another service. Once you and your Account Manager agree to use the IBE service, you will be assigned a Research Analyst who will work with you to develop questions targeted to your business needs. The sequential steps are outlined below along with a corresponding timeframe for each step.

<b>Phase</b>	<b>Action Items</b>	<b>Timeframe</b>
<b>Step 1: Contact Your Account Manager</b>	The first step is to talk with your Account Manager about your proposed survey topic. Functional-specific, non-proprietary business issues are best suited for this research format. The survey topic should be significantly different from previous surveys. If you choose to use the IBE, your Account Manager will direct you to Step 2.	Less than one hour of phone conversation time with Account Manager
<b>Step 2: Review Topic and Question Development Guide</b>	Review the Survey and Question Development Guide (see section C of Survey Guidelines) and consult with the necessary stakeholders in your company to further define and prioritize your questions.	2-5 business days
<b>Step 3: Complete IBE Survey Request Form</b>	Complete a Survey Request Form (one-page Word document). See section D of this document for background information, targeting tips, and sample survey questions. Submit this form to your Account Manager.	1-2 business days, depending on your schedule
<b>Step 4: Initial Call with Research Analyst</b>	Your Account Manager will set up a conference call for you to meet your Research Analyst. During this call, your Research Analyst will ask you about your answers to the Survey and Question Development Guide questions and then assist in further refining the survey questions.	1 hour
<b>Step 5: Final Stage of Survey Development</b>	The Research Analyst creates an online version of your survey for your feedback and final approval. The Research Analyst also creates the target list of prospective survey participants.	1-2 business days
<b>Step 6: Survey Announcement</b>	Your survey will be announced in an email to GBC members and target companies in the Best Practices, LLC client database.	1 day after survey finalization
<b>Step 7: Data Collection</b>	Targeted participants respond to the survey. We generally allow about two weeks for invited participants to respond.	3 weeks (may be extended to generate more responses)
<b>Step 8: Survey Analysis</b>	The Research Analyst analyzes the data and survey analysis in slide format to all participants.	5 business days after survey ends
<b>Step 9: Follow-up Conference Call</b>	Your Research Analyst will walk through the survey findings with you to answer any questions.	Depends on your schedule

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**C) SURVEY AND QUESTION DEVELOPMENT GUIDE**

Since the IBE survey service is designed to be a fast-turnaround, concise, Internet research tool, companies are asked to carefully focus their benchmark exchanges to **6-12 questions per survey**. To ensure that the survey addresses your **most critical** business issues, we have developed a checklist to help you prioritize and focus your questions.

Additionally, this section contains survey question development tips and guidelines, designed to assist you in creating a survey that will best answer your pressing business issues.

**Preliminary Questions to Focus Survey Efforts**

This guide will help you in seeking input from key stakeholders and determining whether requests for questions are “nice to know” or “need to know” according to survey objectives. There is no need to answer all of these questions or submit any answers to Best Practices, LLC. However, your assigned Research Analyst may review these topics with you to better assist in shaping high-quality questions for your survey.

**Stakeholder Issues**

- Who are the key stakeholders (including users) who should have input into the survey questions?
- Who are your internal clients? Who is sponsoring the research?
- Who have you already spoken to about this project?
- Who in the company may be impacted by changes resulting from this research?
- What is your role in this project?

**Survey Objectives**

- What would you like to be able to do with the information from this research?
- If you were to name the top three main research objectives, what would they be?
- What is your ultimate business objective? (e.g., bottom line and top line)
- Why is this an important issue for you and your company *now*?
- How will you use this information?
- What have you already done in this area? How can we build on this work?

**Question Development Tips**

Survey development is a process that requires planning and foresight. The survey sponsor develops the first draft of survey questions as well as response options for questions. Research Analysts then help in refining the questions. These tips are designed to help you create a focused survey.

- Review some examples of current IBE surveys. For examples of surveys and types of response options, see the current surveys posted at [www.globalbenchmarking.com/surveys](http://www.globalbenchmarking.com/surveys).
- Determine the validity of the question by asking yourself, “Does this question get at what I really want to know?” Often, working backward from a desired response helps form a question targeted to that data set.
- Determine the reliability of the question by asking yourself, “If ten people outside my company read this question, would they all interpret it the same way?” Ask someone inside your organization to answer your survey as an outsider to test the question wording.
- Create clear, concise questions. Avoid company-specific terminology, jargon, acronyms, and vernacular. Avoid covering two or more issues in the same question.
- Develop questions that will collect standard responses. Develop multiple response options for most questions to ensure the survey collects a standard data set.
- Develop closed-ended questions. Almost all questions need to have closed-ended response options that respondents can check –either choose one or check all that apply. Suggestions include:
  - List as many possible response options as you can (but typically less than 10)
  - In developing these response options, you may want to consult a knowledgeable expert or secondary sources (e.g., through Internet searches)

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**Survey Question Examples**

Much of the time spent in developing surveys lies in identifying the appropriate response options for either "choose all that apply" or "choose only one" types of questions. Examples include:

Choose All that Apply

What kinds of events, activities, policies, and resources are provided to employees as a part of your company's women's initiatives? Please choose all that apply.

- Employee networks for women
- Women's leadership conferences
- Advisory councils to promote women in leadership
- Mentoring programs
- Speaker series for women
- Career development programs
- Other (please specify) \_\_\_\_\_

Choose Only One

Which of the following best describes how your company organizes your Quality Organization to provide services to the corporation?

- Decentralized group that is integrated into the business or divisions
- Centralized group that establishes strategic quality initiatives and regulates compliance
- Centralized group that recommends but has no compliance arm
- Hybrid Model, please specify \_\_\_\_\_

Rating Matrix

How do you think your customers would rate your company's activities to keep customers informed of orders for services/products or repairs? Please assign a rating on a scale from 1 to 3, where 1 represents "Poor," 2 represents "Competent," and 3 represents "Excellent."

	1	2	3
Company Activities to Keep Customers Informed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Fill-in-the-Blank

What vendors does your company use for each self-help capability? Enter n/a if you do not have that capability.

Key word search	<input type="text"/>
Natural language search	<input type="text"/>
Guided navigation	<input type="text"/>
FAQs	<input type="text"/>
Chat	<input type="text"/>
IM	<input type="text"/>
Virtual reps	<input type="text"/>
Other	<input type="text"/>

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Open-Ended Questions

One or two questions can be open-ended. We have found that more open-ended questions can yield inconsistent results and deter participation in the survey. To guarantee standard, valuable results, create a question that clearly describes the information you are seeking.

Examples:

Please share your top three lessons learned in developing and retaining women.

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What is the methodology used to measure ROI?

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**Standard Questions**

Best Practices, LLC will always add a few concluding questions to the survey; these questions do not count in your 6-12 questions. Standard questions include:

- Would you be willing to participate in a knowledge exchange conference call with [Sponsor Company Name] to discuss this topic in more detail?
  - Yes
  - No
  
- Please provide the following contact information so Best Practices can send survey results.

Name	<input type="text"/>
Title	<input type="text"/>
Company	<input type="text"/>
Industry	<input type="text" value="(Click here to choose)"/>
Phone #	<input type="text"/>
Email	<input type="text"/>

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## D) SAMPLE SURVEY REQUEST FORM

To initiate an IBE survey, GBC members are asked to complete a Survey Request Form (in a separate Word document). Detailed and thoughtful responses to these questions help ensure that Research Analysts can start the project with a good understanding of how to create a survey that will best meet your business needs. Below is a sample Survey Request Form complete with sample responses from a variety of different surveys.

**Survey Title:** Briefly describe the proposed title/topic of your survey.

- Growing Leaders Through Employee Development Programs

**Survey Topic:** Form a sentence or two describing the theme of this survey and what the data will uncover.

- Since increasing representation of women and developing the talent of female employees is an important business strategy to many companies' success, this survey is intended to provide a high-level understanding of what companies are doing to effectively develop and retain women in today's workforce.

**Types of Companies/Industries to Target:** List the relevant types of companies or industries best suited to participate in your survey.

- Telecommunications, utilities, and package delivery industries, preferably over 1000 employees.

**Job Title(s)/Functions to Target:** Include a listing of all positions and departments that may be able to complete your survey. We will always add "and related employees who are knowledgeable in this area."

- HR Executives, Sponsors or Administrators of Women Development Programs, Employee Development Specialists, and related employees who are knowledgeable in this area.

**Purpose of request:** Describe the overall context for conducting the survey in two to three sentences.

- Our company is looking to maximize the potential of all employees and to diversify its workforce for competitive advantage. Increasing representation of women and developing the talent of female employees is an important business strategy to further our company's success. This survey is intended to provide a high-level understanding of what companies are doing to effectively develop and retain women in today's workforce.

**Survey Question Development:** Use the Survey and Question Development Guide above to create 6 to 12 questions with relevant response options listed for your closed-ended questions. Research Analysts will help you prioritize and shape questions during the survey development call.

- See the Survey and Question Development Guide