ALUMNI SURVEYS:

#Aitraining

DESIGNING, DEPLOYING, AND ANALYZING RESPONSES

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ACADEMIC IMPRESSIONS

LEARNING OUTCOME

After participating...

...you will be able to better design and deploy alumni surveys to gain useful information.

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AGENDA

- Overview of Alumni Survey Types & Goals
- Event Surveys
- Attitudinal Surveys
- On the Horizon

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OVERVIEW OF ALUMNI SURVEY TYPES AND GOALS

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SURVEY TYPES

ATTITUDINAL	TRANSACTIONAL

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📊 POLL

What is the best reasons to do event surveys? (Pick 3)

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FOOD, LOCATION, ETC.

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TIME/DAY POLLS

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EXCUSE FOR ANOTHER TOUCH

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RESOURCE

Subject line: Your survey comments about XYZ event

Dear <Mr. or Ms. or Mrs. Last Name>: First, I want to thank you for taking the time to fill out the survey. This type of feedback helps us immensely as we plan future programs. Second, I apologize that you felt <discuss comment>.

I also wanted to let you know that we received several comments similar to yours and we're taking the feedback very seriously. In fact, I just had a meeting with my supervisor about this and for the next event we're going to try to <do whatever to correct>. Thank you again for your comments and your time. If you would like to speak about this on the phone, please send me a few days and times that work for you and I will call you. Best, <your name>

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RESOURCE

Subject line: Your survey comments about XYZ event

Dear <Mr. or Ms. or Mrs. Last Name>: First, I want to thank you for taking the time to fill out the survey. This type of feedback helps us immensely as we plan future programs.

Second, I wondered if you'd like to schedule a time to talk on the phone about your comments? If so, please send me a few dates and times that work, and the number where I can reach you.

Best, <your name>

SPEAKER/HOST STEWARDSHIP

DATA TO INFORM BROADER EVENT TACTICS

BETTER MARKETING & CLEARER EXPECTATIONS

- Venue location
- Food choices
- Cost – open bar?
- Parking situation
- Speaker topic
- Timing specifics

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COMMON OBJECTIONS

Won't they get survey fatigue?

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COMMON OBJECTIONS

Why ask if we can't fix their complaints?

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COMMON OBJECTIONS

No time!

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CHOOSE YOUR TOOL
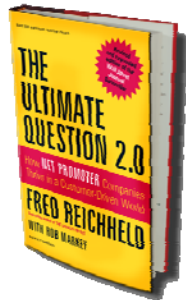

CHOOSE YOUR TOOL

TIPS

- 3-5 Questions max
- Include contact information fields
- Send within 24 hours, reminder 2 days later to those who didn't respond
- Specific email with one call to action
- Advanced: load attendee data behind the scenes
- Ending slide

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TIPS

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QUESTIONS

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SURVEY DESIGN: NET PROMOTER 101
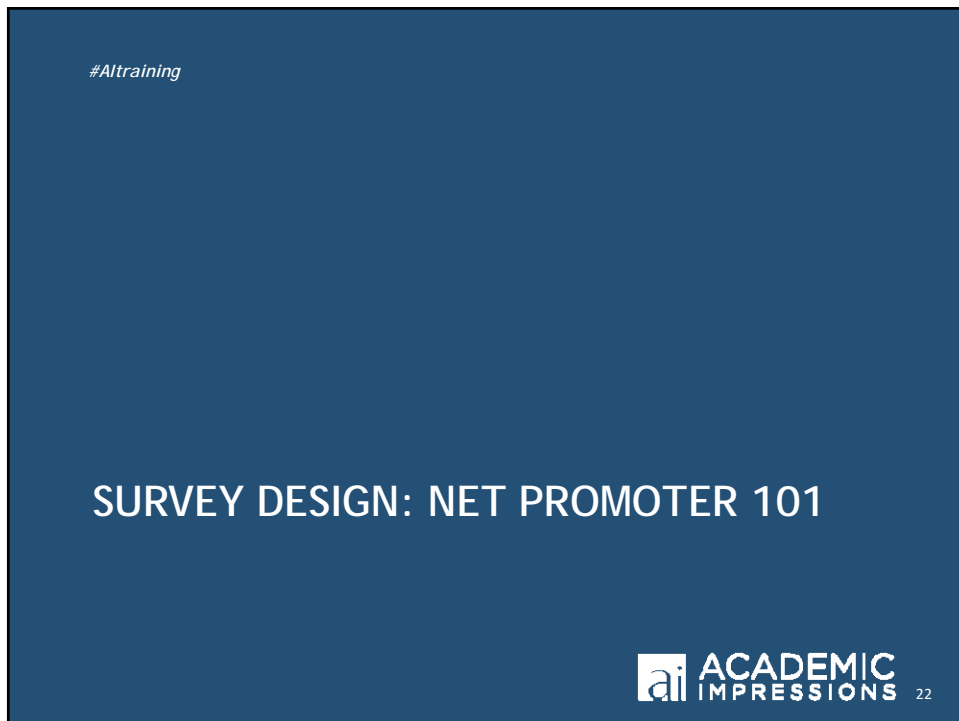
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NET PROMOTER SYSTEM

NET PROMOTER SYSTEM

1) Based on your experience, would you recommend this to another alumnus/a?

0 – Would NOT recommend at all
1
2
3
4
5
6
7
8
9
10 – Absolutely WOULD recommend

2) Why did you answer that way?

NET PROMOTER SYSTEM

Promoters: 9 or 10

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NET PROMOTER SYSTEM

Passives: 7 or 8

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NET PROMOTER SYSTEM

Detractors: 0-6

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NET PROMOTER SYSTEM

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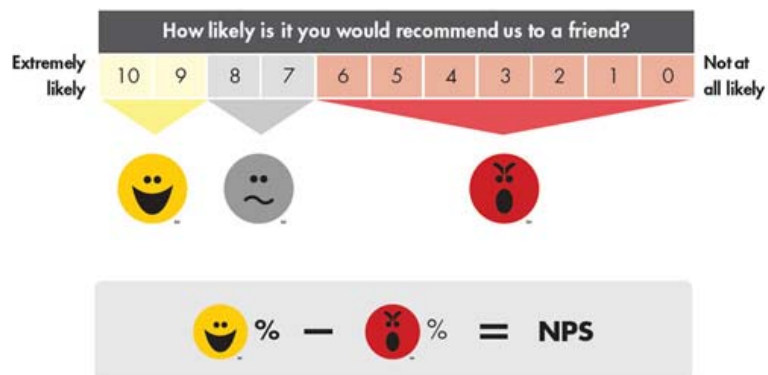
RESOURCE

SURVEY EXAMPLE

Based on your experience at the BALANCE reception and dinner, would you recommend to other Lehigh alumni that they attend next year's event?

Not at all likely   Extremely likely
0   1   2   3   4   5   6   7   8   9   10

Please share why you answered that way?

Periodically we follow up with survey respondents to learn more about your experience. If you would be open to hearing from us, please leave your name and contact information here:

First and Last Name:
Email Address:
Daytime Phone Number:

OTHER QUESTIONS TO ASK

- *How many people are you going to follow up with from tonight's networking event?*
- *Why did you come? Topic/speaker/networking/social/nothing else to do*
- *Any other questions for the speaker?*
- *What was your main takeaway?*

FAQs

- Do we send to registrants or actual attendees?
- How do you easily analyze?

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WORD CLOUDS

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FAQs

How to follow up with respondents?

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FOLLOW UP

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FAQs

How do we use event data in
performance evaluations?

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? QUESTIONS

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RE·UN·ION
[REE-YOON-YUHN]

1. the act of uniting again.
2. the state of being united again.
3. **a gathering of relatives, friends, or associates at regular intervals or after separation**
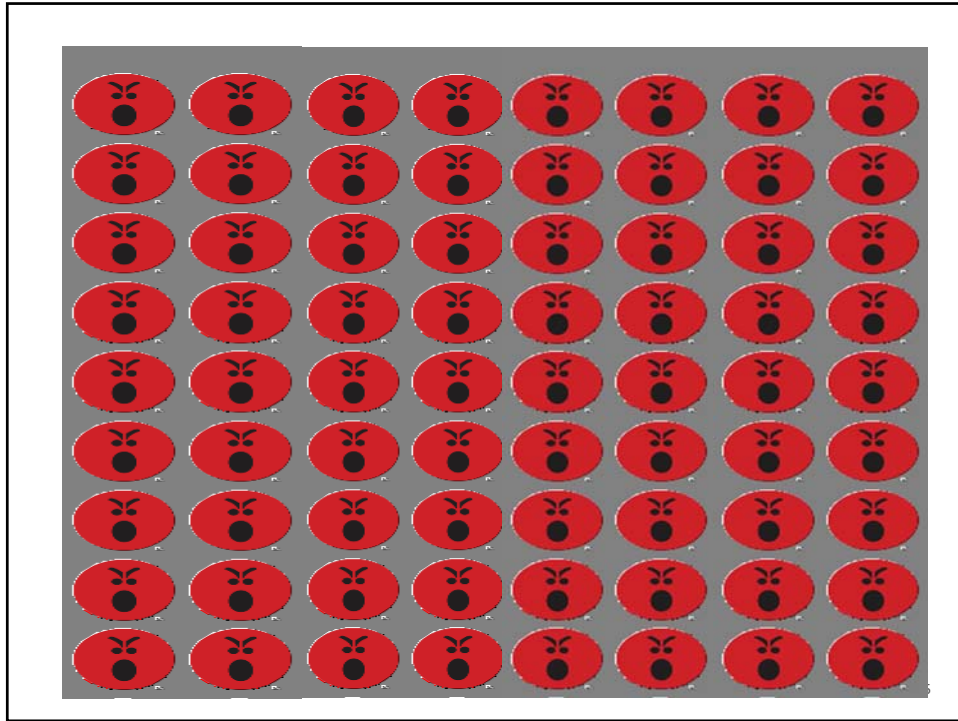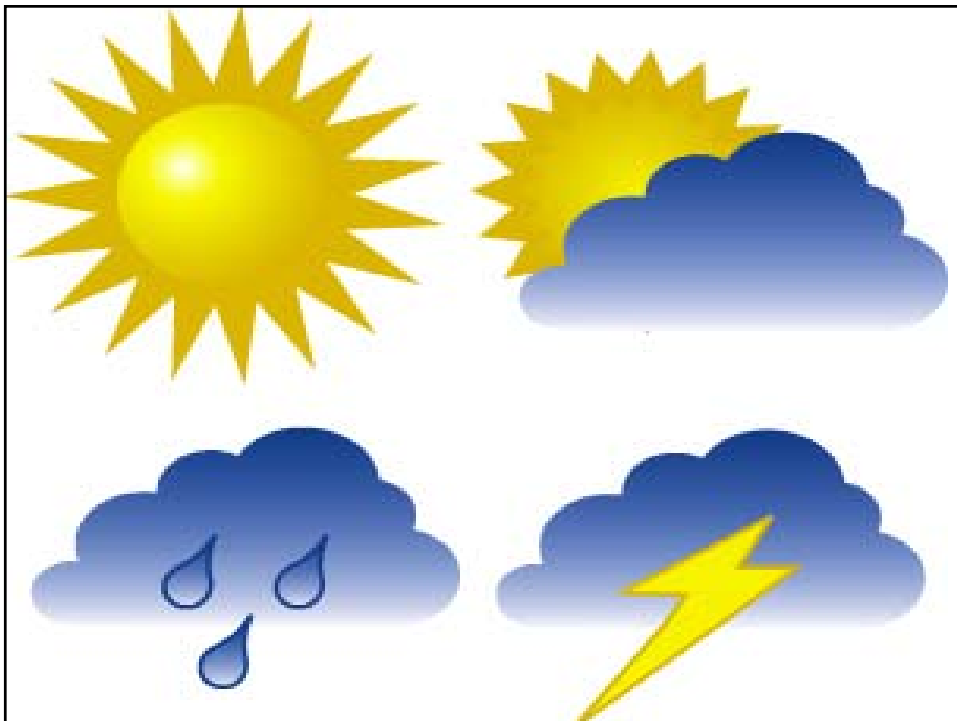
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RE·UN·ION
[REE-YOON-YUHN]

1. the act of uniting again.
2. **the state of being united again.**
3. a gathering of relatives, friends, or associates at regular intervals or after separation

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RE·UN·ION
[REE-YOON-YUHN]

1. the act of uniting again.
2. the state of being united again.
3. **a gathering of relatives, friends, or associates at regular intervals or after separation**

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ALUMNI ATTITUDINAL SURVEYS

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POLL

What is the best reason to do attitudinal surveys?

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WAY TO IDENTIFY
VOLUNTEERS, DONORS,
MENTORS, ETC.

PARTNERSHIPS WITH
STUDENT SERVICES

MARKET RESEARCH FOR "PRODUCT DEVELOPMENT"

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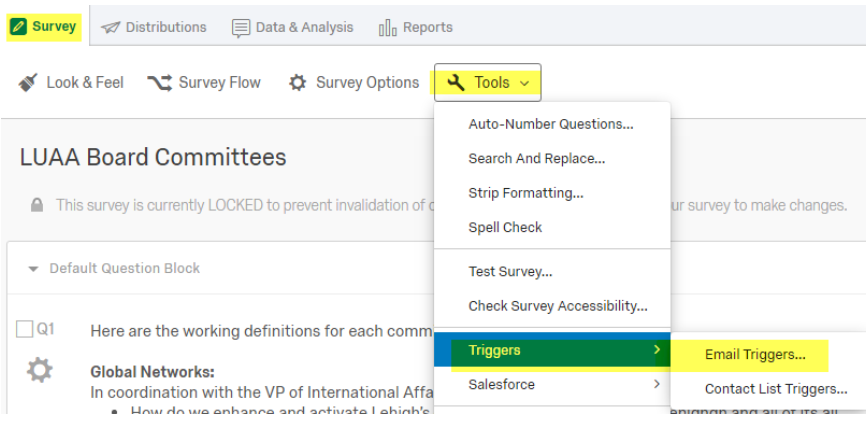
GATHERING DATA

- Consider a survey consultant
- NPS as first question, then segment responses to Promoter, Passive, Detractor
- Test with colleagues or board first
- Consider a survey consultant
- 15 minutes or less
- Include contact information fields
- Specific email with one call to action
- Consider sending in waves
- Use triggers to keep tabs on responses

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COULD NPS BE AN INCLINATION INDICATOR?

Engagement / NPS

■ Detractors ■ Passives ■ Promoters

	Lifetime Donors	Donor Last 3 yrs	Volunteers	Event Attendees
Detractors	55%	20%	2%	29%
Passives	65%	36%	4%	40%
Promoters	77%	46%	8%	49%

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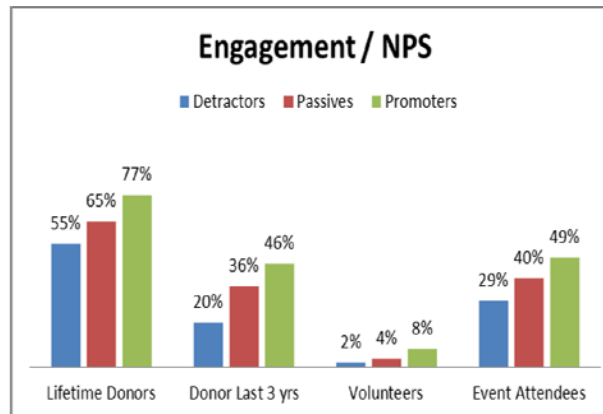
CAPACITY + NPS = INCLINATION

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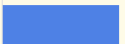
ALUMNI RELATIONS PROGRAM DECISIONS

3. What motivates you to attend Lehigh events? Select a

| Answer		Response	%
Social interaction		472	65%
Supporting a team or other group		358	49%
Career/business networking opportunities		262	36%
Intellectual content		248	34%
Learning about today's Lehigh		229	31%
Helping students		222	30%
Events are part of my role as a Lehigh Volunteer		68	9%

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ALUMNI RELATIONS PROGRAM DECISIONS

4. Why don't you attend Lehigh activities? Select all tha

Answer		Response	%
Not a priority in my life right now		426	57%
Venues are too far from my home or work		357	47%
Activities don't appeal to me		159	21%
There are no events in my area		136	18%
Don't see the benefit		133	18%
Don't know about them		117	16%
Afraid I won't know anyone		121	16%
Health or mobility issues		28	4%
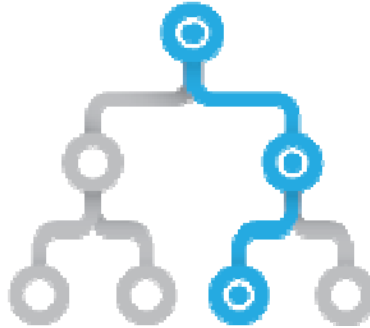
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? QUESTIONS

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LESSONS LEARNED

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LESSONS
LEARNED

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IMPRESSIONS 67

LESSONS
LEARNED

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stra, per inceptos himenaeos. Phasellus porttitor quam vita
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LESSONS
LEARNED

LESSONS
LEARNED

LESSONS LEARNED

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ON THE HORIZON

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SYSTEM FIXES

BETTER MARKETING & CLEARER EXPECTATIONS

- Venue location
- Food choices
- Cost – open bar?
- Parking situation
- Speaker topic
- Timing specifics

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PROGRAM DEVELOPMENT

Lowest: Webinars
30s-60s

Highest: Niche
60s-90s

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■ DATABASE
INTEGRATION

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■ NEW PROGRAM
DEVELOPMENT

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IMPRESSIONS 76

FOLLOW UP SURVEYS

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INCORPORATE INTO MAJOR GIFT PIPELINE ALGORITHMS

 + NPS

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VOLUNTEER SURVEYS

LEADERSHIP CONFERENCE

🔑 TAKEAWAYS

- Think about surveys as an more formalized, tidier ongoing dialogue with constituents
- Start doing transactional surveys…now!
- Incorporate follow up time with survey-takers into event planning
- Share survey reports with giving officers, event planners, engagement officers
- Take a day every month or so to read through all your surveys and find common themes

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❓ QUESTIONS

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EVALUATION

Thank you!

Please remember to complete the event evaluation.
Your comments will help us continually improve the
quality of our programs.

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