

3.3.30: Polling Tools

Learning Objectives

- Discuss when and how to use polling tools

In a meeting that has lots of people in various locations and several agenda items to accomplish, it can be a little scary to make sure you have all the details nailed down. Sending an email saying “what do you need?” not only can yield answers from “a flip-chart and markers” to “six webcams and a tap dancing iguana,” it’s also hard for you as the meeting planner to keep track of all the moving parts: schedule, topics, equipment, menu, location.

Conducting an online poll among your team members lets you collect all the information in one place and it gives you control over limiting the options. For example, if you are asking about equipment and supplies, you can choose to list only those items that are reasonable and easy to find. If you’re asking whether a meeting requires video chat, you can ask where people will be joining from. “Switzerland,” “the factory in Omaha” or “home with a broken ankle” are valid reasons for video chat. “Simultaneously watching *Game of Thrones* on my iPad” is not.

But you can also use polling to get an anonymous take on more serious issues around meetings.

Example

Let’s look at a hypothetical situation in which polling tools might be useful not just in deciding whether you serve pizza or burritos at the meeting but also in handling a challenging agenda item:

Shawn is a regional manager for a clothing retailer. He wants to have a meeting to share the results of some shop-alongs conducted in eight stores in his region by a qualitative researcher and a set of loyal customers. Most of the news is good, but there are a few issues to fix. Some of these issues are systemic and will require input from all his store managers. Others are limited to two specific stores and are concerning because they show those stores are not meeting basic customer service standards.

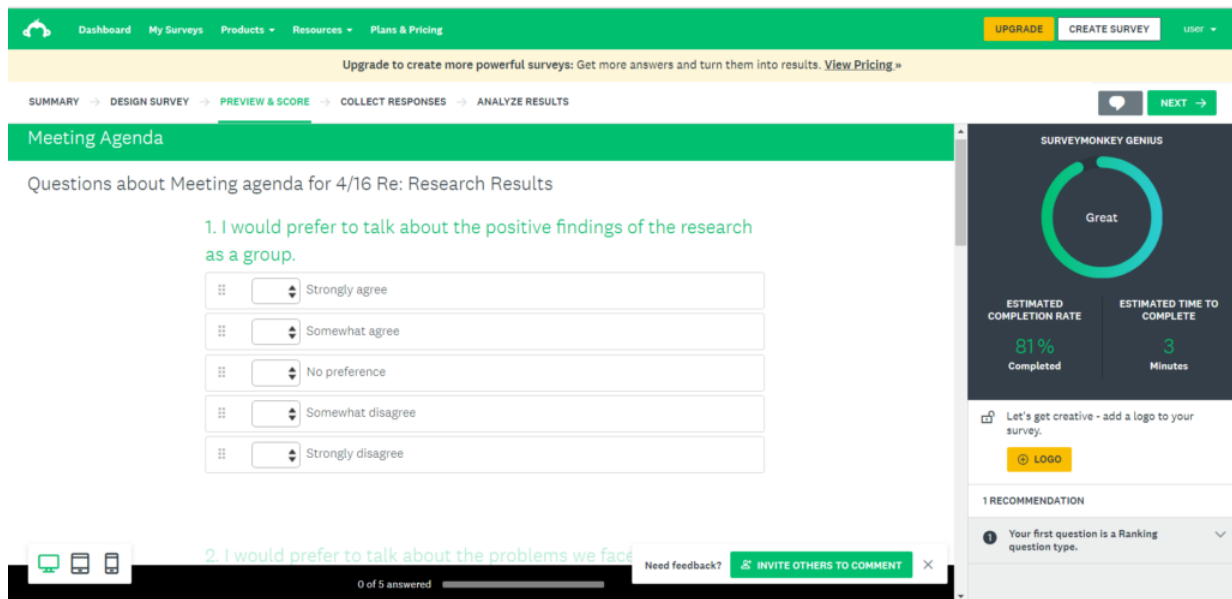
Shawn decides to send his own summary of the report to the store managers prior to a conference call, specifying the problems but not which stores have them, and asking managers to brainstorm on solutions in advance. Then he starts to plan his meeting agenda. He can envision this meeting playing out in a few different ways, and he can’t quite make up his mind how to proceed.

- Does he focus only on the positives and the systemic issues in this meeting and save the store-specific problems for one-on-one calls?
- Does he talk about the store-specific issues as a group, allowing the other managers to offer suggestions and support to the managers of the struggling stores?

Since all the managers have his summary, he decides to give them a say in how the meeting is run. He creates an account in SurveyMonkey, and he goes through the steps of making a survey.

The basic rules of survey creation are pretty simple at this level, and the software makes it easy.

- Ask as few questions as possible while still getting the needed information.
- Ask only questions that related to the issue at hand. Don’t ask questions just because you’re curious or want to provoke your respondents.
- Phrase questions in a way that gives a full range of options and doesn’t “beg the question.” That is, don’t ask a question like, “How much do you hate plaid pants?” and then give a ranking from “More than a root canal” to “About the same as a hangnail.” The plaid pants-lovers of the world will not be pleased.
- Think about the best question type for what you need to learn. In the scenario above, Shawn decided he really wanted to know how intensely his store managers felt about the agenda issues, so he chose a Ranking question to help them express it. He asked this same kind of question about “problems we face as a region” and “issues at individual stores.”



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SUMMARY → DESIGN SURVEY → **PREVIEW & SCORE** → COLLECT RESPONSES → ANALYZE RESULTS

Meeting Agenda

Questions about Meeting agenda for 4/16 Re: Research Results

1. I would prefer to talk about the positive findings of the research as a group.

Strongly agree

Somewhat agree

No preference

Somewhat disagree

Strongly disagree

0 of 5 answered

Need feedback? [INVITE OTHERS TO COMMENT](#)

SURVEYMONKEY GENIUS

Great

ESTIMATED COMPLETION RATE: 81% Completed

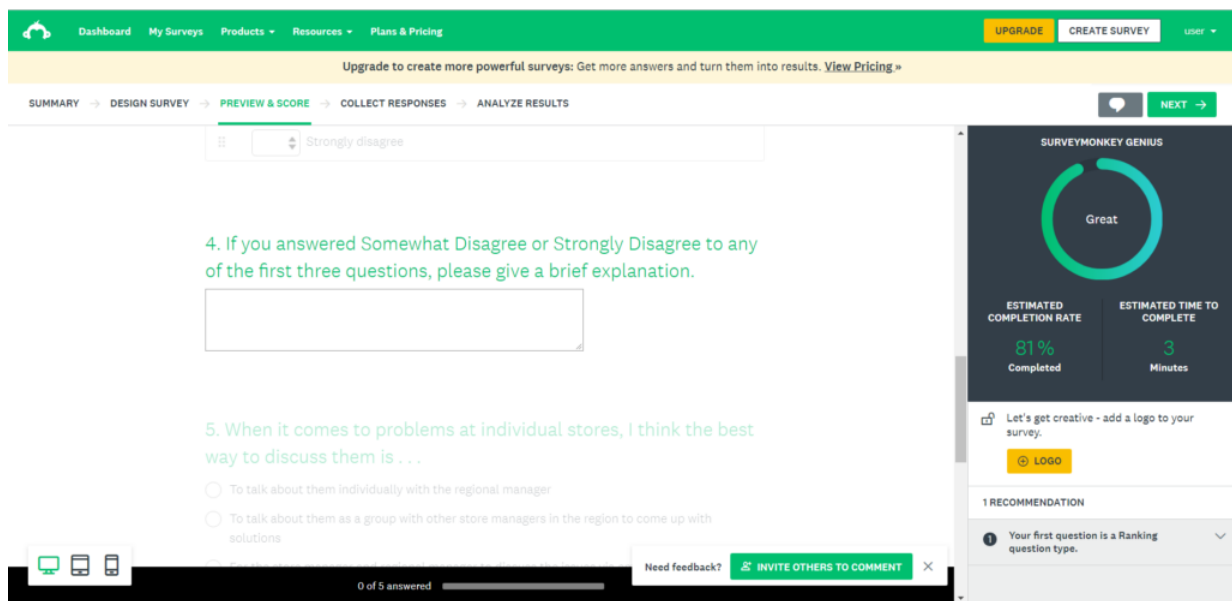
ESTIMATED TIME TO COMPLETE: 3 Minutes

Let's get creative - add a logo to your survey. [LOGO](#)

1 RECOMMENDATION

Your first question is a Ranking question type.

- He also wanted to give people an opportunity to express their feelings in their own words, especially if they didn't want to talk about a topic, so he created a Comment question.



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Meeting Agenda

4. If you answered Somewhat Disagree or Strongly Disagree to any of the first three questions, please give a brief explanation.

5. When it comes to problems at individual stores, I think the best way to discuss them is . . .

To talk about them individually with the regional manager

To talk about them as a group with other store managers in the region to come up with solutions

0 of 5 answered

Need feedback? [INVITE OTHERS TO COMMENT](#)

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Great

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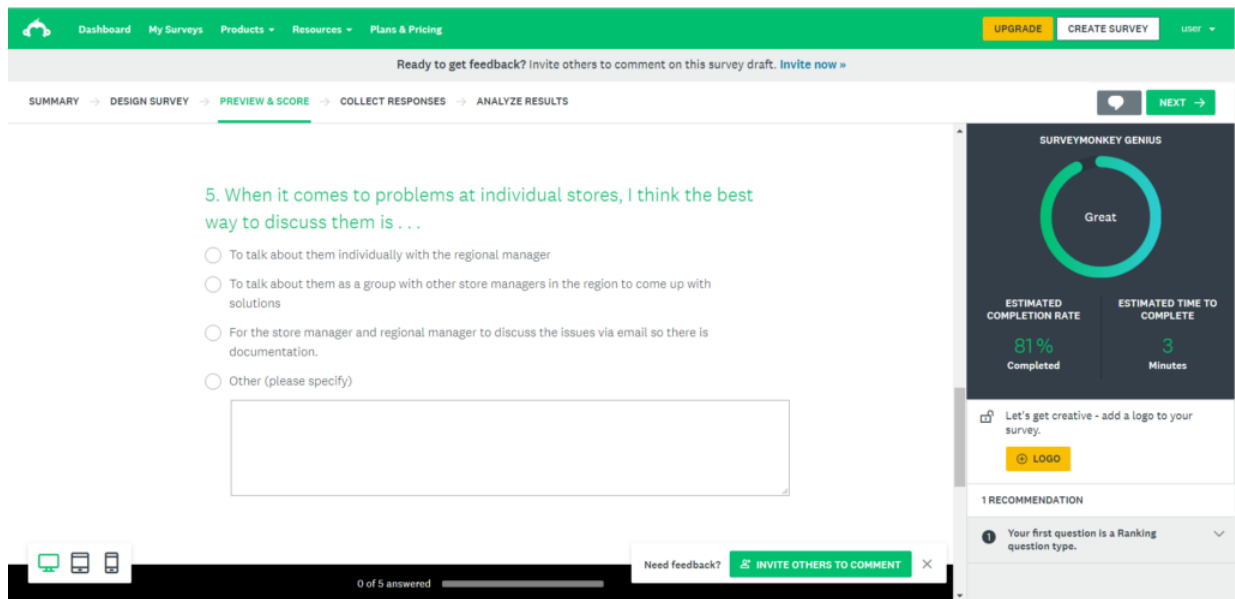
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1 RECOMMENDATION

Your first question is a Ranking question type.

- Finally, he figured he would directly ask how bad news should be discussed. He had some ideas of his own, but he also wanted to be open to approaches he hadn't thought of. For this, he used a Multiple Choice question type with a final Other option with a text box.



As you can see, a well-constructed poll or survey can really help a meeting host or leader plan for everything from snacks to serious issues.

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