



Museum Development North West

MDNW ViewPoint User Guide I

Creating A Survey



Supported using public funding by

**ARTS COUNCIL
ENGLAND**

Contents

Introduction	3
1 Questioning your audience – improving survey outputs	4
2 Quantitative and qualitative data	6
3 Logging in to the Manchester Partnership account	7
4 Creating a survey	9
Making a copy of the regional benchmarking survey	9
Adding your questions	10
Routing your survey	12
Design and preview your survey	13
Validation rules and finish or assign your survey	15
Further information	16

Introduction

This user guide supports ViewPoint users through the process of creating a survey

Museum Development North West (MDNW) manages a regional audience data collection programme using the ViewPoint system. Initiated in 2008 by Renaissance North West, MDNW have rolled it out since 2012 and there are now 79 devices capturing live audience data in Accredited North West museums.

ViewPoint is a data collection system produced and supported by CRT (Customer Experience Feedback Solutions) www.crtviewpoint.com. Audience feedback can be captured using ViewPoint surveys on a variety of platforms - on-site surveys on kiosks and tablets, ViewPoint survey app on secured tablets; SMS texts or smartphone surveys, online surveys via email or website or paper surveys. MDNW holds a licence for 100 channels, of which we currently use 79%. If you wish to explore using various methods to consult your audiences please contact MDNW.

ViewPoint enables museums to collect valuable audience data that:

- Supports regional and cluster benchmarking and marketing
- Can ask customised questions that are easy to ask and understand
- Allow questions to be targeted to different audiences
- Is useful for clusters where a network use the same questions
- Is useful for analysing audience data
- Identifies audience trends
- Has strength in its “anonymity”
- Can be significant for applying for external funding
- Can be used for advocacy
- Can signpost people to other heritage organisations within a cluster
- Is cheaper than other forms of market research

For case studies on how ViewPoint has been used by museums to support development, read our Knowing Your Audiences publication [here](#).

1 Questioning your audience – improving survey outputs

A key step in the planning of your survey is to be clear about its purpose and scope, to reflect gaps in existing knowledge and to inform future actions. The scope of your survey cycle is usually determined by time, resources and staff constraints, so keep those in mind when you develop your survey question i.e. “What is that that I want to know and why?”

Museums usually use a general survey to gauge customer feedback, and sometimes surveys for a specific exhibition or event. Whichever type of survey you are using, a key step in how effective it will be is for you to be clear about its purpose and scope at the outset.

If you don't think about how you ask your questions at least as much as what questions you want to ask, you won't get anything useful out of the exercise. Once you start getting curious, however, it is important to rein yourself in and ask, “Before I add this to the survey, what will I be able to do with the results?” If the answer is, “Nothing”, either because the required action is out of your control or because the answer doesn't help to inform activity plans or strategies, then do not ask the question. A key element to successful engagement is not to raise expectations in the mind of the person giving up their time to complete your survey.

Before you upload your survey, always test it on a colleague who hasn't been part of the design process. Keep the wording as simple as possible; this does not mean you need to dumb down, but you should consider whether any of your questions contain “professional jargon” that your visitors may not be clear on or whether they may produce unintended answers.

Make sure that they hear the question that you believe you are asking, by asking them to interpret the question for you, as if they were explaining it to someone else.

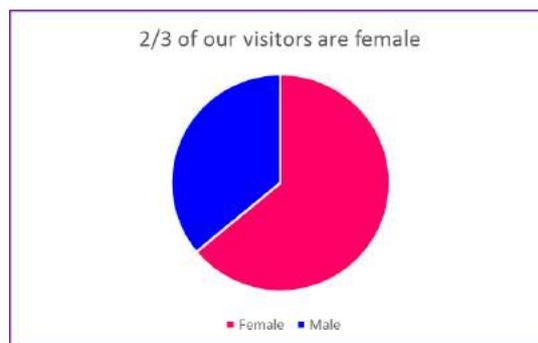
An example of unintended answers would be the asking of the gender question. If you ask, "What gender are you?" then this will only give you the gender of the person answering the survey. This in turn will skew your gender split and remove the opportunity for a group to share their experiences and complete the survey together – enforcing the positive (hopefully) aspects of their visit.

A more effective question would be to ask how many people of each gender are in the group answering the survey. Not only will this give you a far more accurate gender split, but it will also tell you how many people are in each group and therefore how many people the data set represents. You may, after all, only have 100 completed surveys, but if each one represents the views of an average of say three people, then 300 people are represented by the answers – allowing for the fact that the under 5s can't really contribute.

The figure below shows how to make the calculation.

How many females are there in your party (including yourself)				
Respondent selects from	Number of people selecting each answer in your sample		Multiply together	
0	19	A3*D3 as formula	0	
1	32	Copy this down	32	
2	52		104	
3	41		123	
4	12		48	
5 or more	2	Change 5 or more to 5	10	
		sum(G3:G8)	317	Then add up
Percentage for Gender split				
				64% G9/J11
How many males are there in your party (including yourself)				
Respondent selects from	Number of people selecting each answer in your sample		Multiply together	
0	20	A13*D13 as formula	0	
1	33	Copy this down	33	
2	39		78	
3	12		36	
4	4		16	
5 or more	3	Change 5 or more to 5	15	
			178	Then add up
			495	Add together
				36% G19/J11

This then translates into a simple pie chart.



2 Quantitative and qualitative data

Your ViewPoint machines primarily collect quantitative (or numerical) data. Visitors are asked to select an answer in response to questions and this is collated by the software and is converted into unsorted tables for you to view.

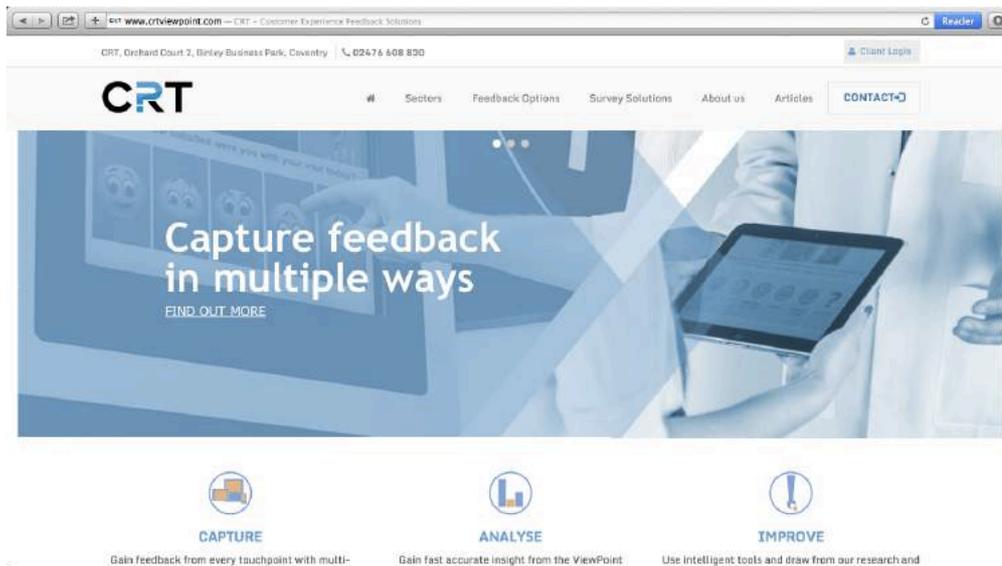
You can also make emotional or intellectual enquiries, by creating a linear wording to ask an emotional question. An example might be, “How far do you agree with the statement *I think that museums can teach things that children do not learn in school?*” and then providing a scaled set of responses, such as the Likert scale, that range from negative to positive e.g. “Agree strongly” down through to “Disagree strongly”.

ViewPoint is also capable of collecting qualitative data by using the open-ended questions, the answers to which tend to be descriptive. As such, qualitative data is harder to analyse than quantitative data. This is because of both the time involved in wading through the information and also the time trying to decide how to group the responses, which in itself can be subjective i.e. dependent on the person doing the analysis.

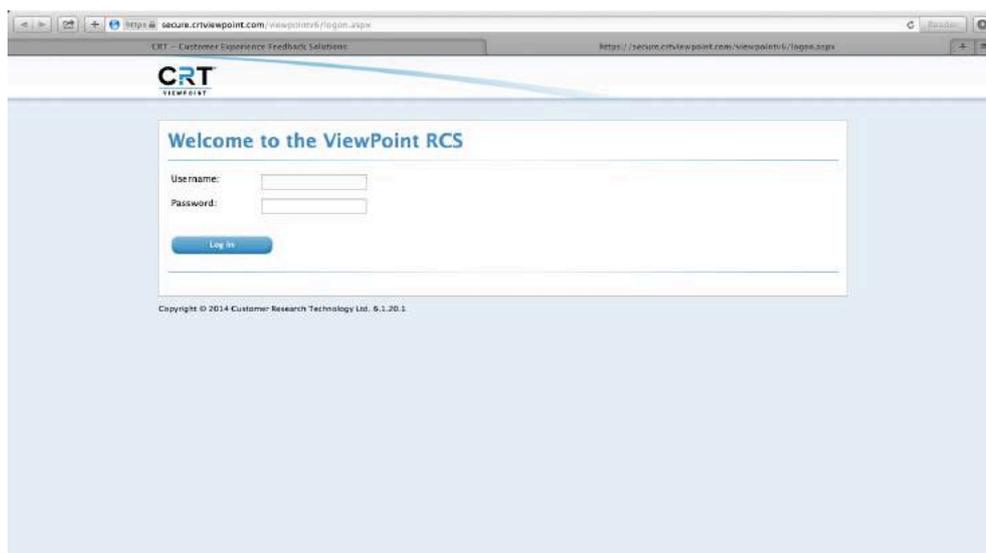
An open question allows the respondent to write as much as they want, whether it answers your question or not! However, the responses can give valuable insights into areas of your service that you may have overlooked, or, if for instance you have a new gallery or display, the open answers can help you to decide what a future closed question (one for which you give the visitor a choice of answers) might look like.

3 Logging in to the Manchester Partnership account

To log in, visit www.crtviewpoint.com and click on **CRT Client Login** link in the right hand corner.



Fill in the username and password. Contact MDNW if you have forgotten these.



This will take you to the welcome screen of your account. The tabs across the top allow you to select a number of options including:

[Surveys](#) - where you can create/copy and edit surveys as well as view the question and response library. This is also the tab you use when you are ready to upload visitor responses.

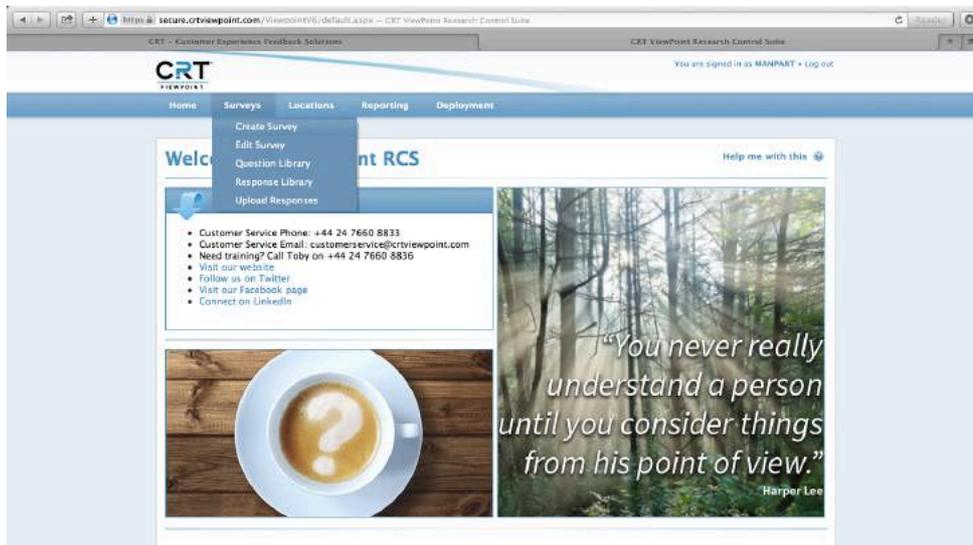
[Locations](#) - where locations can be added and edited as well as regions. "Locations" are the name of each museum with a ViewPoint device and the "Regions" refer to the area in which your museum is located.

[Reporting](#) - where you can create and edit reports on data.

[Deployment](#) - where you can assign a survey to your device.

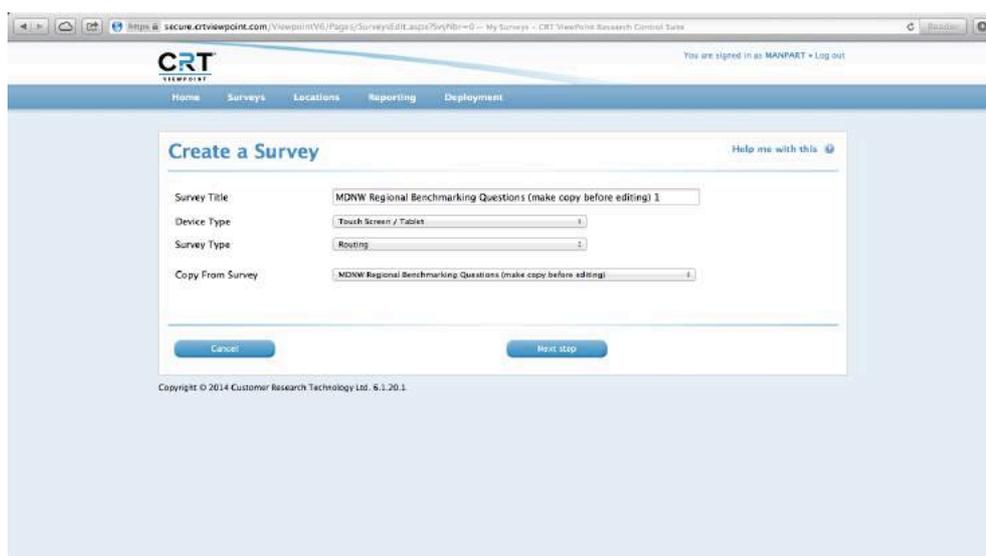
4 Creating a survey

To develop a survey, hover over **Surveys** tab and select **Create Survey**. You can also edit an existing survey here.



Making a copy of the regional benchmarking survey

Select **MDNW Regional Benchmarking Questions (make copy before editing)** from **Copy From Survey** tab on the last line then **change the name** of the new survey in the top line to make it unique to your organisation.



Start the name of your survey with your **MDA code** so it is easy to find in the future. If you don't have one or you are designing a survey for a cohort of museums, use a lettered code that is easily recognisable. Device type should be **Touch Screen / Tablet** (unless you are designing an online survey - see CRT user guides for this) and the survey type you are most likely to want is **Routing** survey. See below for an example of renaming a survey:



The screenshot shows the 'Create a Survey' form in the CRT ViewPoint interface. The form is titled 'Create a Survey' and includes a 'Help me with this' link. The form fields are:

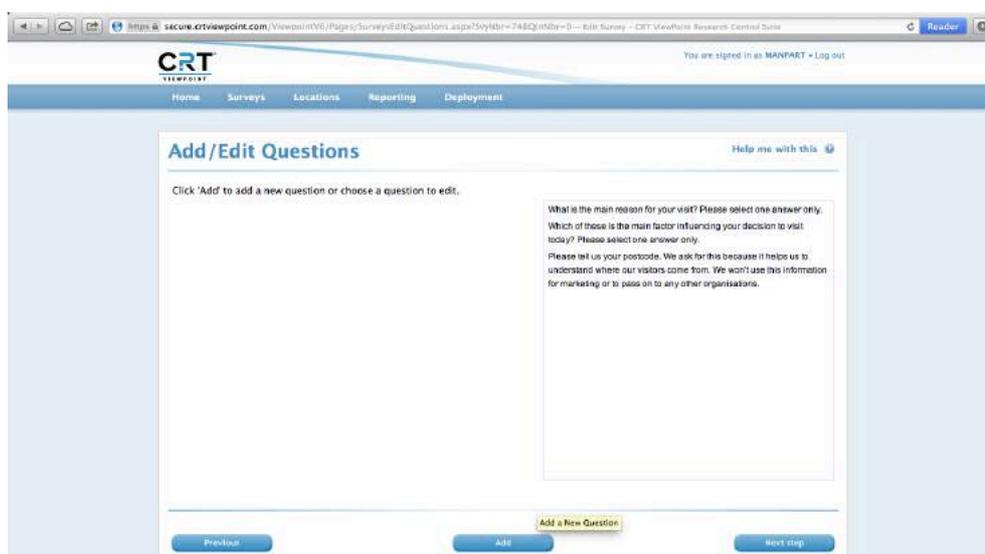
- Survey Title: KEDAH- MOLLI survey
- Device Type: Touch Screen / Tablet
- Survey Type: Routing
- Copy From Survey: MDNW Regional Benchmarking Questions (make copy before editing)

Buttons for 'Cancel' and 'Next step' are visible at the bottom of the form. The footer of the page reads 'Copyright © 2014 Customer Research Technology Ltd. 6.1.20.1'.

Click **Next step** to add your own questions to the benchmarking survey questions.

Adding your questions

Press the **Add** tab at the bottom of the screen to start adding in your questions to the three regional benchmarking questions.



The screenshot shows the 'Add/Edit Questions' form in the CRT ViewPoint interface. The form is titled 'Add/Edit Questions' and includes a 'Help me with this' link. The form includes a text area for adding a new question and a 'Next step' button. The text area contains the following text:

Click 'Add' to add a new question or choose a question to edit.

What is the main reason for your visit? Please select one answer only.
Which of these is the main factor influencing your decision to visit today? Please select one answer only.
Please tell us your postcode. We ask for this because it helps us to understand where our visitors come from. We won't use this information for marketing or to pass on to any other organisations.

Buttons for 'Previous', 'Add', and 'Next step' are visible at the bottom of the form.

Add your question into the text box. You can use the question library to select an existing question on the account.

Important! If you go into the question library or response library, don't cancel the page as it takes you back to the add/edit questions page and you lose the additional question you've just typed in, so use the back button on your browser instead.

Next select your question type:

- Multiple choice, select one only
- Tabular, select one only
- Multiple choice, select language
- Multiple choice, multiple answers allowed
- Open-ended (which means visitors can enter free text)

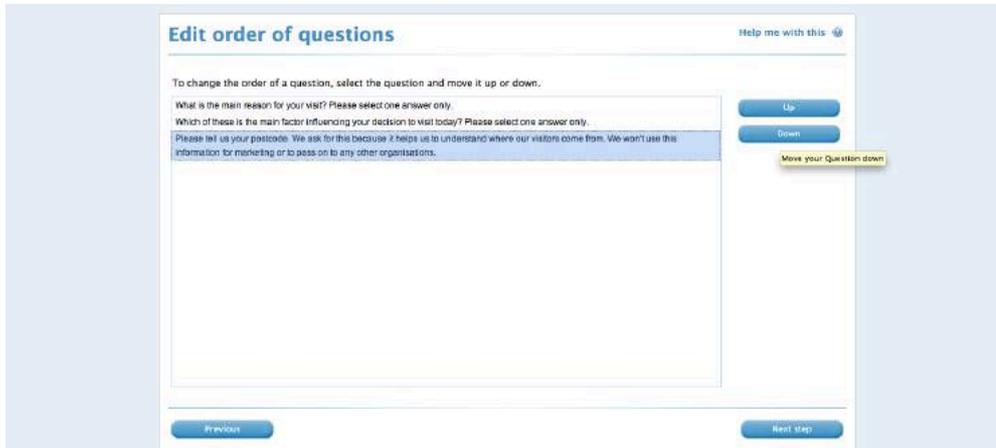
For more information on the different types of questions please see page 20 of the CRT "ViewPoint Manual" on the "Help me with this?" facility on the client account.

Once you have selected the question type, you may have to fill in your response prompts. Again you can use the response library if there is a suitable set of prompts to choose from. Don't forget to **save** the question as you go along. **Repeat the process until you've added in all the questions you want to ask.**



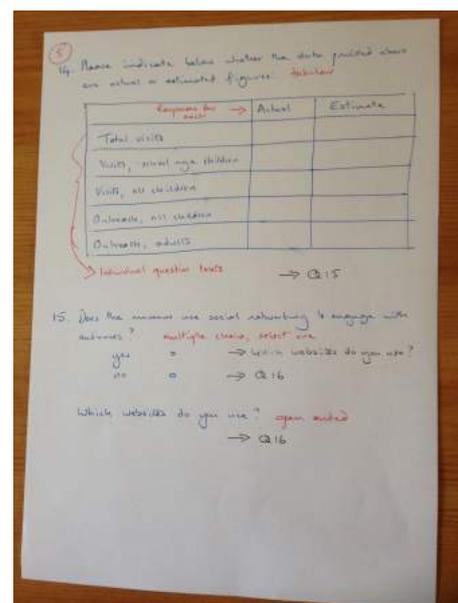
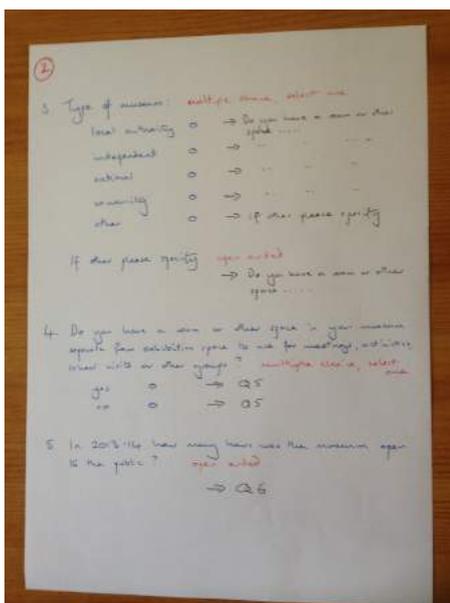
The screenshot shows a web browser window displaying the CRT ViewPoint 'Add/Edit Questions' page. The browser address bar shows the URL: <https://secure.crtviewpoint.com/ViewpointVE/Pages/Surveys/EditQuestions.aspx?SyNbr=74&QrNbr=0>. The page header includes the CRT ViewPoint logo and navigation links: Home, Surveys, Locations, Reporting, and Deployment. A user is logged in as 'MANPART'. The main content area is titled 'Add/Edit Questions' and contains a 'Help me with this?' link. Below the title, there is a warning: 'Click 'save' to save changes or choose a question to edit (unsaved changes will be lost)'. The 'Question Text' section has a 'Question library' button and a text input field with a yellow placeholder 'Type the question text:'. The 'Question Type' section has a 'Response library' button and a dropdown menu labeled 'Select Question Type to Add'. On the right side, there is a preview of a question: 'What is the main reason for your visit? Please select one answer only. Which of these is the main factor influencing your decision to visit today? Please select one answer only. Please tell us your postcode. We ask for this because it helps us to understand where our visitors come from. We won't use this information for marketing or to pass on to any other organisations.'

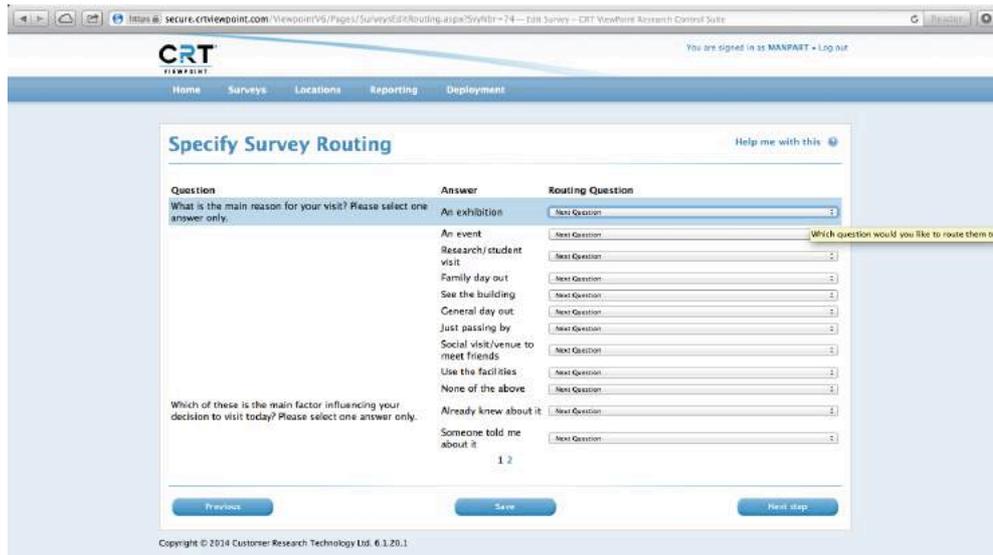
The **next step** allows you to change the order of the questions by selecting one then clicking **up** or **down** button. Place demographic questions such as postcode, ethnicity and gender further down the survey as people are more likely to fill these in once already engaged with the survey. Then click **next step**.



Routing your survey

This takes you on to the page where you can specify survey routing. This allows you to direct visitors to different questions depending on their responses. It may be easier to do it on paper as a flow chart first before applying it online especially as the order of questions can't be changed once routing has been applied – see the examples below.





Don't forget to **Save** your changes as you go along. You can check the routing works at the design stage and go back and edit if necessary.

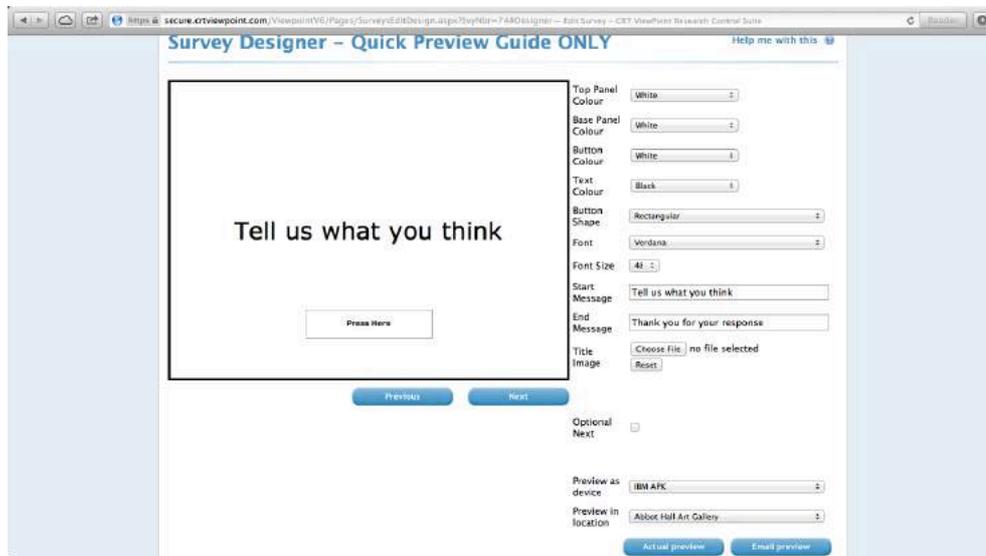
The programme is automatically set up to move each response on to the next main question. In the three benchmarking questions, you may want to route "None of the above" and "Other" to an additional question to give the user the chance to give their comments in an open-ended question.

Always select **End survey** as the option for the last question otherwise the survey will repeat in a loop. Click **Next step** once you have finished routing. See page 46 of the CRT "ViewPoint Manual" for support on routing. This can be found on the client account using the "Help me with this?" facility.

Design and preview your survey

This takes you to **Survey Designer** and **Quick Preview**. Here you can change the colour, font style and size and start and end messages of your survey. You can also add images as a banner at the top of the screen and on response buttons.

Note – colour choices don't appear on some Mac computers.



You can also remove the “next” button to stop it appearing on every question screen when the survey is deployed to move visitors directly to next questions without having to press next. To do this, tick the “optional next” box. The “next” button will remain on multiple choice and free text questions.

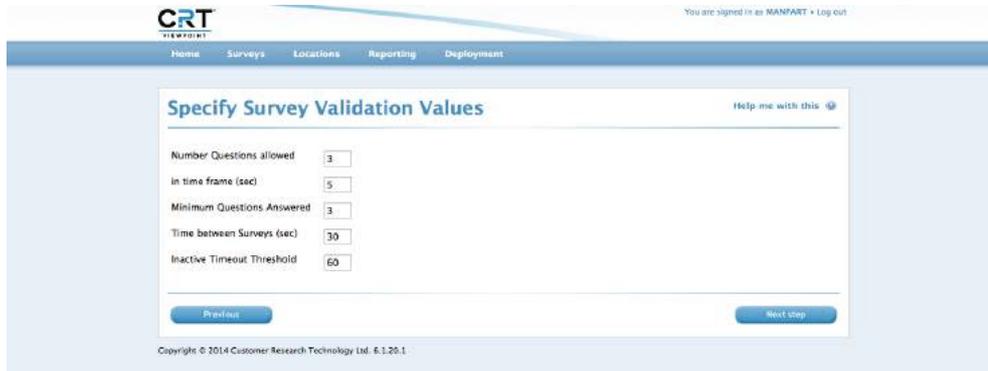
Don't forget to **Apply changes** at each stage of design otherwise they won't be saved.

The **Actual Preview** button allows you to see how your survey will look to visitors. You can close the window that pops up as the preview to continue editing the survey. You may want to amend button size and layout as a result of your preview. At this point you may have to install Microsoft Silverlight to see the preview, but the software will guide you through if you have to do this.

When you are happy with the design and you have applied the changes, click **next step**.

Validation rules and finish or assign your survey

This will take you to the **Validation Values** page, which you can set to filter out incomplete or disingenuous responses.



The screenshot shows the 'Specify Survey Validation Values' page in the ViewPoint system. The page has a blue header with the ViewPoint logo and navigation links: Home, Surveys, Locations, Reporting, and Deployment. The user is signed in as MANPART. The main content area contains five input fields for validation rules: 'Number Questions allowed' (3), 'In time frame (sec)' (5), 'Minimum Questions Answered' (3), 'Time between Surveys (sec)' (30), and 'Inactive Timeout Threshold' (60). There are 'Previous' and 'Next Step' buttons at the bottom. The footer contains the copyright notice: 'Copyright © 2014 Customer Research Technology Ltd. 6.1.20.1'.

All time values are in seconds. The **Number of questions allowed, in time frame** allows you to set what you think is the minimum time it should take to answer a set number of questions. **Minimum questions answered** allows you to choose how many responses to questions across an entire survey should be counted as valid.

You can also set **time allowed between surveys** to stop individuals from completing multiple surveys. The time lapse will put people off standing around and waiting for the screen to refresh. Don't give too much of a delay as there may be people waiting to fill a survey in.

If a survey is started but then left inactive you can choose the time lapse before the survey restarts again. This will presume that the visitor has decided not to complete the survey. The **inactive time threshold** allows you to do this. Click **next step** to **assign your survey to a device** or to **finish**. You can deploy your survey straight away or save it until you are ready.



The screenshot shows the 'Your survey was successfully created' page in the ViewPoint system. The page has a blue header with the ViewPoint logo and navigation links: Home, Surveys, Locations, Reporting, and Deployment. The user is signed in as MANPART. The main content area contains a confirmation message: 'Your survey was successfully created'. Below the message is a button labeled 'Assign your survey to your devices'. There is a 'Finish' button at the bottom right. The footer contains the copyright notice: 'Copyright © 2014 Customer Research Technology Ltd. 6.1.20.1'.

For support with deploying your survey see ViewPoint User Guide II.

Further information

This ViewPoint User Guide publication has been produced as part of a series by MDNW to support audience development in North West Accredited museums using the ViewPoint system. This complements a series of training sessions that have been delivered since 2014. **ViewPoint User Guide II – Deploy Survey and Upload Responses** and **ViewPoint User Guide III – Extracting and Analysing Data** are also available to download from our blog:

<https://museumdevelopmentnorthwest.wordpress.com>

Credits

Esther Morrison, Managing Director at 7 Park Street, Business Hub and Coffee Shop, has produced section one, **Questioning Your Audience** and section 2, **Quantitative and Qualitative Data** on behalf of MDNW. Esther formally worked for Stockport Council and was responsible for capturing and evaluating audience feedback across Stockport Museums.

For information on the Regional Audience Data Collection Programme contact MDNW:

Kaye Hardyman, Museum Development Officer (North)
kaye.hardyman@manchester.ac.uk

Lynsey Jones, Museum Development Officer (South)
Lynsey.jones@manchester.ac.uk

For technical support for your ViewPoint Hardware Contact CRT:

CRT Customer Service Helpline: customerservice@crtviewpoint.com

Telephone: 024 7660 8833

Cover Image: Gawthorpe Textiles Collection, Gawthorpe Hall © Simon Critchley 2014-15
p12 © MDNW 2014

MDNW April 2016