

White paper: Engaging senior executives

In the world of business-to-business research, there are few things more challenging than engaging with senior executives. Managing Partners, Directors and other senior executives have little time for non-essential tasks, such as surveys and other types of research. Frustratingly, requests are often ignored, or get passed down the chain. Yet these are the people who hold the answers and the meaningful insights smart companies are looking for. It is through engagement at a senior level that business to business service providers will find out what their key clients think and need. Having a greater understanding of what it takes to build deeper levels of loyalty and engagement from these most valuable customers is therefore vital.

Compared with other types of respondents, there are a number of unique challenges that need to be overcome when engaging with top level executives. So how do we get past these to gain the actionable feedback and insight that comes from participation in research at the highest level?

Know your audience and establish rapport

Don't just ask – speak to executive survey participants in a way that is relevant, provides context, and establishes a peer relationship that will garner well thought-out responses.

- It's important to use language that provides a context and makes it more likely that executives commit to engaging in research. Present questions to participants as an opportunity for them to provide valuable insights, particularly around ideas on best practice and for specific business challenges.
- Make it unique, personalised, interactive and well thought out. The difference between, for example *"How do you like to consume news? Tell us by taking this survey"* and *"Are you reading this on a) a phone, b) a tablet, c) a computer, or d) something else? No, really, we want to know. We're conducting some research on how Senior Executives like to consume news - we'd love to include your views"*, can be huge in terms of improving survey participation for online executive surveys.
- Smart, busy people are constantly being asked for their valuable time so they need a compelling reason to answer, and provide thoughtful responses. Show them that this survey is relevant to them — let them know why their opinions are being sought and how their input will be used to improve the service or product you provide.
- Above all else, senior executives value the insights of their peers and feel most comfortable expressing their opinions to the individuals they have most in common with. By sending the survey request from an equivalent senior level in your organisation, you help create the feeling of a high level conversation amongst peers.

Timing is everything

Particularly in terms of online surveys, make it quick, easy and mobile optimised.

- Use design and language to create the easiest most efficient experience for users. Users who become frustrated or pressured for time are more likely to abandon a survey, so make it easy to navigate on either desktop or mobile.
- Avoid too many links that take time to launch, particularly on mobile devices. If possible provide a single-page survey.
- Consider the best day of the week and time of day to send the survey. In some cases it might be more appropriate to send on a Saturday when there's more time to complete it and less competing email traffic.

Design with the end in mind

In order to get the responses you need, consider how the survey will be conducted, who it will target and who will carry it out.

- Ensure that the survey reaches the right people (at the right level) and that they're asked the right questions. Tangible outcomes are vital – there has to be a “so what” that comes from your research data. This will be a direct result of asking the right questions and making sure that your research results provide a blueprint for improvement and a clear view of which actions will make the most difference.
- Agree on your targets – information from direct reports can be useful as well, since they are well versed in strategic and directional matters, and often have a better handle on day to day challenges.
- Employ the right research professional. An experienced researcher with good business acumen will engage with senior executives in a way that is focused and independent, but with the ability to ensure red flags are immediately highlighted.

Not just surveys

While online surveys are an efficient and streamlined approach to engaging with executives, there are other options that might be better suited to this group. The best run research programmes provide a range of options, with some carried out face to face and others completed online. Having a research specialist interview (rather than survey) a small number of executive customers separately and in person could be invaluable in terms of building relationships and providing the kind of meaty, useful and actionable insight companies crave.

- Personal interviews conducted either in person or over the phone, will uncover not just the facts, but also the story behind the answers. They allow the researcher to uncover insights that underlie facts and outcomes. There's also a greater opportunity to clarify questions and follow-up on answers, allowing the interviewer to capture examples and unusual stories that help with analysis and contribute to a broader understanding of the data.
- Participants might actually prefer a short face to face meeting or phone call to express their views
- Buy in can sometimes be greater when offered a research interview, as executives are inclined to see it as more important or worthy of their attention than a survey
- One on one interviews give clients the opportunity to set the agenda, possibly leading to opportunities for improvements not previously considered
- An interview style research approach provides the opportunity to ask lengthier questions that require concentration and in turn yield more thoughtful responses.

What's their time worth?

Because their time is extremely valuable, top executives are less likely than other participants to be enticed by a relatively small amount of money or other commonly offered incentives. They might also be limited in their ability to accept an incentive. However, there are other options that are more appropriate, but still provide some sort of return on investment for executive research participants:

- A donation to a charity might be a better option, especially if it's a charity that's connected to the participants' company, or that they have a personal relationship with
- Offering to share some of the research findings with executive participants can be an effective incentive because it offers valuable intellectual property and industry intelligence that is relatively difficult to come by
- Acknowledge their specialist input, either informally and in person as part of the interview and/ or more formally in the report – particularly if the outcomes of the research are to be publicly circulated or published.

Confidentiality is paramount

At executive level assurances of confidentiality are even more important.

- Let survey participants know that their answers will be treated in the strictest confidence, unless they give their express permission for their views to be quoted.
- Some executive participants might be subject to non-disclosure clauses, so be prepared to retreat on a question, or to alter a survey as required.
- Ensure your survey is conducted by a professional who understands these issues and will represent your organisation to your business customers in an appropriate manner.

Bringing you closer to your customers

As New Zealand's leading customer and community engagement consultancy, Buzz Channel helps its clients to build powerful connections with customers and bring their stakeholders' voices into the heart of their organisation.

Buzz has a wealth of experience conducting a variety of research initiatives with clients from some of this country's top performing companies such as Sky, 2 degrees, Fisher & Paykel and Vector. We also work regularly with some of the country's biggest Local Body and Central Government organisations, including Auckland Council and Auckland District Health Board.

Our research team has the skills, experience, and professionalism to design a comprehensive research process – whether via an online survey, face-to-face interview, or over the phone – to get the insights you need. Plus, we'll make it an enjoyable experience for both you and your customers.

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