

# Web Survey Best Practices Comprehensive Survey Design & Implementation Checklist

## 1. Pre-Planning & Objectives

- ☐ **Define Your Research Question**  
Clearly articulate the central hypothesis or question your survey aims to address.
- ☐ **Identify Target Population, Your Sample Source, & Sampling Plan**  
Understand who you need responses from; outline your sampling frame and strategy (random, stratified, etc.).
- ☐ **Consult Relevant Literature**  
Review existing validated instruments and guidelines to ensure your questions align with known best practices.
- ☐ **Ensure Ethical Compliance**  
Check Institutional Review Board (IRB) requirements and plan for informed consent, anonymity, or confidentiality as needed.

## 2. Questionnaire Design

- ☐ **Draft Clear, Concise Questions OR Find Questions Previously Used & Validated**  
Use plain and unambiguous language.
- ☐ **Organize Questions Logically**  
Group similar topics and place screening or demographic questions last if they might deter completion.
- ☐ **Match Question Type to Data Needs**
  - ☐ Radio buttons for single-select
  - ☐ Checkboxes for multi-select
  - ☐ Textboxes for open-ended or short responses
- ☐ **Consider Complex Features**
  - ☐ Branching/skip logic for multi-path surveys
  - ☐ Randomization for question or response order
  - ☐ Embedded data fields or piping in repeated measures

### 3. Layout & Interface

- ☐ **Use a Clean, Consistent Format**  
Maintain consistent question numbering, fonts, and styling across pages.
- ☐ **Limit Branding & Distractions**  
Avoid overwhelming logos and graphics that could reduce clarity.
- ☐ **Check Mobile Responsiveness**  
Ensure the design is fully functional on smartphones and tablets.
- ☐ **Don't Be Pulled In By Fancy Web Widgets Without Testing First (i.e. Sliders)**  
Test their effect on dropout rates; if used, ensure they accurately reflect progress.

### 4. Pilot Testing & Validation

- ☐ **Run Cognitive Interviews on New Questions**  
Test new questions with a small group to identify ambiguous wording or confusion.
- ☐ **Conduct a Usability Test On Any New Interface Design**  
Observe how easily participants navigate the survey interface.
- ☐ **Pilot the Full Survey**  
Deploy a small-scale pilot to assess completion times, data quality, dropout patterns, and data.
- ☐ **Refine & Iterate**  
Adjust question-wording, layout, or logic based on pilot feedback.

### 5. Launch & Data Collection

- ☐ **Plan Your Distribution**  
Select the best recruitment method (email lists, panel providers, social media, etc.).
- ☐ **Write a Compelling Invitation (and Reminders)**  
Clarify the survey purpose, estimated completion time, and any incentives.
- ☐ **Monitor Responses**  
Track response rates, dropout points, and device usage.
- ☐ **Offer Technical Support**  
Provide an email or phone contact for respondent questions.

### 6. Post-Collection Review

- ☐ **Data Cleaning & Validation**  
Check for incomplete data, duplicate entries, or contradictory responses.
- ☐ **Assess Data Quality**  
Look for patterns in “straight-lining,” or similar satisficing behavior, or abnormally completion times.
- ☐ **Document Methods & Outcomes**  
Record all survey design decisions, sampling methods, and limitations for future reference.