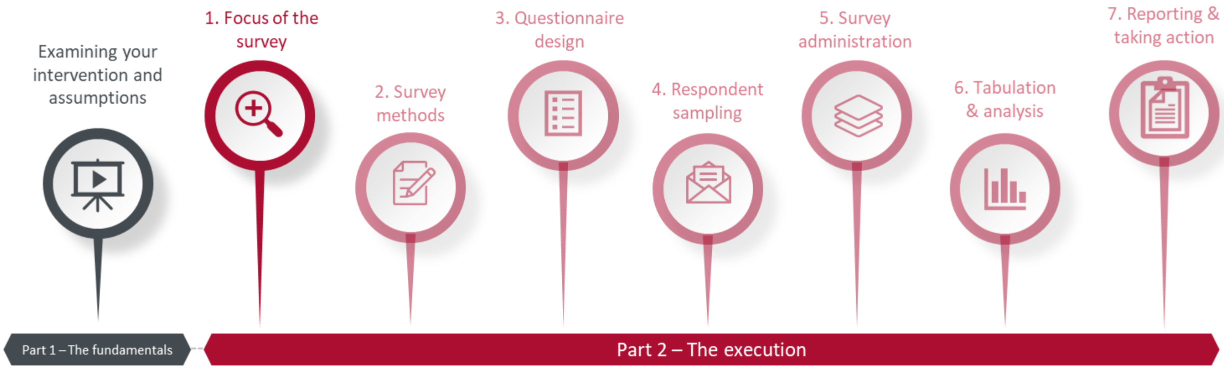
MODULE 1. DEFINE THE FOCUS OF THE SURVEY



In *Leading with Data – Part I: The fundamentals*, you developed a list of assumptions underlying the strategy you adopt to create social impact and maintain financial sustainability. You also determined which of these assumptions remain unproven and prioritized the ones you would want to verify though data collection. In this first module of Part II, we build on your previous work to further narrow down the focus of your first data collection survey.

To that end, you need to go back to the original list of assumptions, and think about which type of information is needed to prove each assumption. Is it general statistical data? Or financial data? In these cases, you can dig into existing research or reports. However, for other assumptions, you will have to collect your own primary data from a group of stakeholders to prove whether this assumption is correct, or not. There are various ways to gather primary data, from field observation to focus groups and interviews, but one of the quickest, cheapest and most effective methods is **running a field survey**. This is the methodology we are adopting in this training. Good assumptions that can be tested with a field survey typically have to do with the personal views and experiences of your customers, suppliers or employees. For instance, a field survey could enquire about topics such as the benefits they perceive from your product/service, their level of satisfaction and the reasons behind it, the challenges they face, and their interest in new potential offerings.

To define the specific focus of your survey, go through your assumptions and, for each one of them, determine **who you would need to survey** to obtain the information you need. You may realize that you have multiple groups of stakeholders to survey – for instance, your clients and your retailers. In this case, pick a single group you want to start with because each group of respondents requires a separate survey. Running multiple surveys at once is not recommended, especially if you are new to this. But once you master the surveying methodology, you can of course apply it to as many surveys as you wish!

Next, you need to think carefully about **what kind of information** you need to gather to verify each assumption. It is tempting at this stage to already start formulating specific questions, but instead, think ahead to the results of the survey. What kind of data or metrics would you want to look at? What analysis would you want to run to obtain actionable insights? For example, if one of your assumptions is, "Women farmers like selling their produce to us because as a result they gain more financial independence", you would need to know: the gender of the farmer, the amount of monetary gains realized, their level of satisfaction in working with you, what they value the most about it, and if they can freely choose what to do with the money earned.

If, after choosing a single group of respondents, you still have a long list of assumptions, make sure to further zoom into the most important and actionable ones – a good rule of thumb is a maximum of 5 assumptions, for a survey of around 25 questions or less. Therefore, always ask yourself **why you should prioritize** a given assumption. How much could the answers impact your work and approach? What will you concretely do or change once you have the results? To answer these questions, it is useful to imagine what you would do if the survey results disproved, rather than validated, your assumption.

Please go through this module with care, as it is one of the most critical steps for the successful completion of all following modules! Investing enough time at this stage will make it easier to formulate sharp questions and draw insights from your survey results later on.