

The following Special Report, originally published as a supplement to *Customer Service Newsletter*, offers more ideas on creating an effective customer survey.

— **Editor**
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Customer Service

NEWSLETTER

Survey techniques: How to create an effective customer feedback tool

Getting accurate feedback from your customers is critical, whether you use that input to improve service or processes, enhance relationships or launch new products. There are many customer feedback formats companies can use (written, postcard, phone, Internet), and choosing one will depend on the type of information you're looking for as well as your specific customer base.

Simplicity is the key to Garden Botanika's customer satisfaction surveys. The Redmond, WA-based retail chain, which sells natural cosmetics and fragrances, uses a one-page written survey that has yielded highly actionable feedback. And, just as important, the tool has helped to create an ongoing dialog with its customers.

It's a simple vehicle — a customer feedback form on one side; a personal, newsy, yet chatty letter signed by the president on the other.

Customer service performance feedback is limited to three questions:

- What are your expectations for quality operator service?
- What are your expectations for "ease of ordering"?
- What are your expectations for delivery time?

Each open-ended question is followed by a close-ended question — How close did we come to meeting those expectations? — and a five-point rating scale.

Customer survey results are tallied on a quarterly basis and an overview report goes out to retailers. And customers are not left out of the feedback loop, says Vice President of Marketing Mike Jaglois. The flip side of the customer satisfaction survey (which contains Garden Botanika's newsletter) candidly reports to customers about the company's recent triumphs and "most miserable failures" in a review of the company's better and worse moments, called "The good, the bad and the ugly."

Explains Jaglois: "What's most important, is that we want people to feel that there are people behind

Garden Botanika — and that they can talk to us and we'll listen."

The basics of written survey design

In some cases, you can use a well-designed written questionnaire as a baseline for complementary feedback tools, such as phone surveys, email or postcard surveys.

To create an effective written survey:

- Keep it easy to understand and respond to, and don't make it too long. Try to anticipate and remove any barriers that might prevent the customer from filling it out and getting it back to you.
- Make sure the questions ask what you intend.
- Only ask one item per question.
- Decide whether to use open-ended questions or closed-ended. Open-ended questions are cumbersome and difficult to analyze, but they provide you with some insights and additional information you might not get otherwise.
- Decide what type of scale you're going to use. The key here is: Pick one. Then use that scale consistently with all of your surveys companywide.
- Develop a brief introduction to the survey. Explain the purpose of the survey and include any instructions. Customers are more likely to complete the survey if they know why you need it, and how to complete it. You may also want to collect information such as name, function or company so that you can segregate the data further. Be sure to explain in the introduction that while this is optional, it will allow you to follow up with specific customer issues.

How to develop effective questions

Poorly worded or confusing questions will not only kill your chances of getting a good response rate, you

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may end up frustrating customers as well.

The questions you use should relate to your objectives and be relevant to what you want to measure. If a question is not relevant to your product or service, it's likely to confuse the customer. A few suggestions on question development:

- Keep the questions concise. Long questions can make the survey difficult to read and discourage customers from completing it. Eliminate unnecessary words. For instance, instead of: "Did the rep provide you with personal service when you asked to be helped with your account?" Aim for: "Did the rep provide personal service?"

- Try to avoid vague and ambiguous questions. The customer should be able to understand exactly what you are asking. Instead of: "Was the bank transaction by the teller acceptable?" Aim for: "Did the bank transaction take a short period of time?" And "Did the teller talk to you in a pleasant way?"

- Make sure each question contains only one thought. If more than one are embedded in a question, it's confusing to the customer who wants to respond positively to one thought and negatively to

another. Instead of: "Was the rep pleasant and did she handle your transaction in a short amount of time?" Aim for: "Was the rep pleasant?" And "Did the rep handle your transaction in a short amount of time?"

- Try to avoid negatives when phrasing your questions. Instead of: "Was the rep not available when you had a problem?" Aim for: "Was the rep always available when you had a problem?"

Be sure to test survey questions *before* sending out the survey. Have a group of your reps (or sample group of customers) fill out the survey. This will help to pinpoint potentially confusing questions.

Besides finding out *how you're doing* for each item, you should also know its *degree of importance* to your customers. If you know what is most important to your customers, you can prioritize improvement projects to focus on those areas first. The simplest way to gauge the level of importance is to include a second rating column with each survey item, asking "How important is this to you?" with a three-point scale: 3 for high, 2 for medium, 1 for low.

Always give customers the option to report problems

Each survey tool your company uses should also include a way for customers to report service problems — even when using extensive written surveys. You can do that by including a section on problem resolution and asking customers to tell you about a very recent problem.

Keep in mind that if customers are very dissatisfied with service recovery on a problem that they've had, it won't be sufficient to them to give that feedback to your company later in the midst of all your survey results. For these situations, consider adding an area in which customers (those who want a representative from your company to contact them) can identify themselves, give a short description of their problem and a phone number where they can be reached.

However, if you include this type of feedback option in your written surveys, you need to have a process in place to follow up *immediately* on complaints. Don't ask for input until you do — it will raise customers' expectations that they're going to get immediate action.

Tips for getting a better response

Even well-designed surveys can get poor response rates if customers are unclear about who should fill it out (especially in a business-to-business

Why customer surveys fail: Problems you can avoid

Here are four common obstacles companies have encountered in survey processes.

1. Complacency. Feedback processes must be ongoing, not a one-time event. Customer priorities are constantly evolving. Consistent surveying will help you to detect and quickly respond to customer changes.

2. Doing nothing with the feedback. Nothing will do more to cut off feedback from your customers than not doing anything with their suggestions. If you don't take some type of action on customer comments, they won't participate in future surveys and, worse, you've demonstrated that you're not responsive to their needs.

3. Not involving your experts. The most valuable internal source of information is your customer service staff. Too often, senior execs ignore the frontline's firsthand knowledge of customers' views. Talking with reps should be one of the first steps in any customer satisfaction survey effort.

4. Using results to discipline staff. Customer feedback should be used to pinpoint improvements — not to punish employees.

Sample Customer Satisfaction Survey

Date:

Company:

Department (optional):

Address (optional):

Name (optional):

Role/function (optional):

Phone (optional):

Instructions: First evaluate the services provided by us. Next, evaluate the services provided by an alternate supplier or competitor in general. A "5" represents worldclass levels, "1" is poor, "3" is average. If you feel that we or the competition performs this service in a worldclass manner, then circle "5." If you feel that we or the competition performs at a poor level then circle "1." Please use the remaining numbers to describe less extreme feelings. In the last column, indicate how important you feel this service is to you. If the statement describes a service that is important to you, please circle "H" for High. If the service is not important to you, circle "L" for Low. If you feel somewhere in between, indicate so by circling "M" for Medium.

If you wish to add information not covered by the statements or provide examples that describe your opinions about a service, please do so in the comment sections provided at the end of each question. The questions are general in nature, yet comprehensive when accompanied with your specific comments. Your comments are valuable in improving our understanding of your requirements, and we appreciate each of them.

Thank you for your time and effort in helping us become a worldclass vendor!

A. Reliability — Ability to perform the promised service dependably and accurately.

	Vendor	Competitor	Importance	Comments
	1 2 3 4 5	1 2 3 4 5	H M L	
1. Follows through with commitments in a timely manner.	1 2 3 4 5	1 2 3 4 5	H M L	
2. Shows a sincere interest in solving my problems.	1 2 3 4 5	1 2 3 4 5	H M L	
3. Performs the service right the first time.	1 2 3 4 5	1 2 3 4 5	H M L	
4. Is dependable.	1 2 3 4 5	1 2 3 4 5	H M L	
5. Insists on error-free records.	1 2 3 4 5	1 2 3 4 5	H M L	

B. Empathy — Caring, individualized attention a firm provides its customers.

1. Gives me personal attention.	1 2 3 4 5	1 2 3 4 5	H M L	
2. Has convenient service features (hours, contacts, etc.).	1 2 3 4 5	1 2 3 4 5	H M L	
3. Has my best interests at heart.	1 2 3 4 5	1 2 3 4 5	H M L	
4. Understands my specific needs.	1 2 3 4 5	1 2 3 4 5	H M L	

C. Tangibles — Appearance of physical facilities, equipment, personnel and communication materials.

1. Has modern and/or appropriate facilities and equipment.	1 2 3 4 5	1 2 3 4 5	H M L	
2. Physical facilities are visually appealing.	1 2 3 4 5	1 2 3 4 5	H M L	
3. Projects a professional image.	1 2 3 4 5	1 2 3 4 5	H M L	

D. Responsiveness — Willingness to help customers and provide prompt service.

1. Employees inform me exactly when services will be performed.	1 2 3 4 5	1 2 3 4 5	H M L	
2. Employees give me prompt service.	1 2 3 4 5	1 2 3 4 5	H M L	
3. Employees are always willing to help me.	1 2 3 4 5	1 2 3 4 5	H M L	
4. Employees are never too busy to respond to my requests.	1 2 3 4 5	1 2 3 4 5	H M L	

E. Assurance — Knowledge and courtesy of staff and their ability to inspire trust and confidence.

1. The behavior of employees instills confidence in me.	1 2 3 4 5	1 2 3 4 5	H M L	
2. I feel safe in my transactions with employees.	1 2 3 4 5	1 2 3 4 5	H M L	
3. Employees are courteous.	1 2 3 4 5	1 2 3 4 5	H M L	
4. Employees have the knowledge to answer my questions.	1 2 3 4 5	1 2 3 4 5	H M L	

Additional Comments:

F. Listed below are five features pertaining to suppliers and the services that they offer. We would like to know how important each of these is to you when you evaluate suppliers' service. Please allocate a total of 100 points to the five features based on how important each is to you — the more important a feature is to you, the more points you should allocate to it.

___ Points	Appropriate facilities/equipment; professional personnel.
___ Points	Accurate and dependable service performance.
___ Points	Willingness to help customers and provide prompt service.
___ Points	Knowledgeable and courteous employees who inspire trust and confidence.
___ Points	Caring, individualized attention to customers.

100 Points

situation). For instance, Cass Logistics Software includes a cover letter that explains the purpose of the survey to customers, says Carole Turk, director, Customer Support Services.

The opening paragraph informs customers that the company is collecting input to improve quality. Then it specifically lists, in bold type, the company's three primary contacts that they want the survey to go to. Turk says that when they left that out in previous surveys, the company was hit by a flood of calls from customers who didn't know who was supposed to fill it out.

Turk also suggests giving the customer a reason *why* they should fill out your questionnaire. In the second paragraph of her cover letter, she tells customers that the company will be using the feedback to focus its resources on the areas customers identify as important. And, that the company will communicate back to the customer its planned actions.

Finally, consider adding yourself as a point of contact for customers who need further clarification or instructions (with your direct phone number). While Turk admits that that's a controversial point in the industry (researchers claim any customer who calls for clarification is then biased), her philosophy is: "If there's anything I can do to maintain the relationship with

customers and keep the lines of communication open, I'll take the risk."

Use a mix of methods to get reliable feedback

No matter how well-crafted your written survey is, if you're using just one tool to collect customer feedback, your results may not yield the information needed to improve service quality.

Instead, consider using a combination of methods — comprehensive written surveys, shorter transaction-based surveys (i.e., postcard or phone), focus groups and customer correspondence — to create a well-rounded view of the customer.

To get a more accurate view of your customer base, consider using several different approaches to gathering customer feedback. Companies that focus their efforts on a single survey tool may be limiting the type and range of responses, and skewing survey results.

"Some customers are more apt to respond verbally; others are more apt to respond to written surveys," says CEO Bruce Grench of HDIS, a mail-order provider of personal-care products in Olivette, MO. Managers shouldn't rely on the occasional written survey as a true representation of what their customers think.

HDIS uses several approaches to solicit customer feedback. "You really have to go after the information," Grench stresses. A few of its more informal methods include:

- In-home focus groups for homebound customers. These relaxed discussions are focused on gathering subjective views rather than collecting quantitative data.
- Brief phone surveys with inbound callers. The company's customer service reps ask callers one or two questions before closing each call. Generally, the information culled by this method centers around new products, services or opportunities. The questions are scripted for CSRs so that they can simply input the answers directly into the computer system. Recently, HDIS used this instant survey tool to query whether its

customers would be interested in purchasing prescription drugs, and "within a week, we were able to collect thousands of responses," he says.

- Feedback via return envelopes. An innovative way to gather customer views on one or two areas, HDIS rotates different survey questions (four or five times per year) on its payment return envelope flaps. Typically, this approach is used to track specific service issues, such as the courtesy of the CSR, promptness of delivery, etc. Plus, envelopes include an area for customer comments.

Use a holistic approach to measurement

Besides using different types of tools to collect input, consider developing surveys aimed at the various customer groups *within* your company. Linking those surveys with a common thread can help you to prioritize which service issues to act on, and whether or not those efforts will add value for your customers.

For instance, surveying employees, independent sales reps and vendors on their views of external customer satisfaction can give you a well-rounded view of customers' expectations and satisfaction.

In fact, surveying your employees about their views on customer satisfaction can help bolster your customer service initiatives. You can get frontline input about the key issues within your company that create a culture for customer service, and uncover gaps between your service culture and its goals.

By comparing the results of employee opinion surveys with customer surveys, you can better pinpoint problems as well as plan your improvement processes. For instance, as you move to take action on service issues, you can use employee opinion survey results to gauge staff attitudes about continuous improvement, teamwork, customer focus, training, incentives for service quality, etc. That's key since the only way you can ensure your customers will be served correctly is by having employees with an attitude that supports customer service, and having a culture that sets up business processes that support customer service. ■

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