

Twelve Tips for Successful Customer Surveys From Plan to Action

What can an organization leader do to maximize the value of customer surveys and assessments? Every customer inquiry brings with it inherent opportunities to improve, enhance value or better align the organization with the needs and wants of its stakeholders. It also brings along risks that can not only reduce the effectiveness of any customer inquiry, but also lessen the degree to which the information is incorporated into action plans. And there is the always present danger that erroneous/inaccurate or biased information steer the organization in the wrong direction. Here are a set of tips to make the most of your customer surveys.

1. Define your primary business question and the related supporting questions. When possible, relate it to your organization's strategic direction. The inquiry's objectives keep the project focused throughout the research process. Information has value to the extent that it can be applied to a specific purpose. Greater clarity yields **on-target research objectives and actionable outcomes**.
2. Estimate the value of the desired information and the costs and risks associated with an erroneous, missing or untimely measurement. Estimate the benefit of the activity your organization will undertake with new information. Narrowing down your business question and the value of the desired information is critical to a successful customer inquiry as it helps estimate the **required precision, level of effort, timeline, sampling and budget**.
3. Identify and involve your key information stakeholders. Information will be most useful when it has involved those who will be responsible for acting on the survey findings. This sometimes includes both strategic and tactical levels of the organization. Stakeholders who are involved from early on contribute toward **better protocol design, greater utility and use of the resulting data**.
4. Equip the researcher with sufficient background information about objectives and previous efforts. If a similar survey has been conducted in the past, offer the data and share information about the challenges and strengths of the previous survey administration. This results in **better protocols and survey instruments**.
5. Use data that is already available. Data collection is expensive, and time-consuming. An assessment of the availability and reliability of existing data should precede new data collection. This **increases efficiency and efficacy**.
6. Define your survey population within your target audiences. Also, think about the subgroups you are most interested in learning about and those you need to exclude. This leads to a **strong sampling and analysis plan**.
7. Identify one internal point of contact and project manager. Managing the scope and facilitating the process with internal audiences can help keep a project **on schedule, on target and on budget**.
8. Play an active role in promoting participation towards achieving a strong response rate. Activities that reinforce survey awareness and encourage participation improve data quality and precision. This **reduces non-response biases and improves accuracy**.
9. Assign adequate resources according to your information objectives and internal capabilities. While savings can sometimes be attained by cutting costs, these are often trade-offs such as lower data precision, quality or risk. Sacrificing appropriate research techniques and advanced analytics can lead to biased, incorrect or insufficient information that impacts the quality of the decisions that are made based on the data. This is essential to **overall quality**.
10. Choose a research team that can lead the effort with strengths in quality and minimal biases. Look for expertise in survey methods, fielding, statistical analysis and the content areas. It is often good to have an independent external researcher guide your survey to avoid internal biases. But just because a researcher is external to the organization, does not mean they are bias-free. This **enhances capabilities and reduces biases and hidden agendas**.
11. Use the information you receive. If you have effectively linked your inquiry with your business objectives and have involved the information stakeholders, the process of using the data is easier. Change is not easy, so be prepared to actively manage action plan formulation and execution not only for positive findings but for challenges encountered as well. This maximizes **information utility**.
12. Let your stakeholders know you are responding to their needs and value their feedback. Research shows that customer loyalty rises among those who have been surveyed, especially when they believe their input has been acted on. Furthermore, subsequent survey response rates also rise. This **enhances stakeholder relationships**.



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