Nine Tips for Increasing Survey Success and Better Understanding Your Customers
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Introduction

While surveys can be a proven, consistent method for gathering customer data, their effectiveness can be hampered if they are poorly written, confusing, not personalized or targeted, or too long. A successful survey should be designed to meet a specific goal and provide accurate data that represents the target population. Ideally, it can also help improve respondent satisfaction levels.

Distilled from years of experience helping successful organizations with surveys, voice of the customer projects, and enterprise feedback management initiatives, these nine top tips can help increase survey success, facilitate a better understanding of customers, and drive loyalty.
Tip 1: Focus on a Goal

One important step that often gets overlooked from the start is a survey’s main goal. Ask yourself three basic questions:

1. Why are we doing it?
2. What do we want to know?
3. What is the main goal of this survey?

It’s all about proper preparation. Taking the time to answer these questions can help your surveys be more successful. If your organization hasn’t conducted a survey in a while, the tendency will be for every department to chime in with questions they want to include. Talk to stakeholders who will be using the data to understand their wants and needs—a narrow goal can help you simplify the survey.

Ask these questions: Can I meet my goals without doing a survey at all? Do our CRM, Web analytics, or other systems contain data that would address this issue? If data exists in another system, use it. Preloading the survey not only helps make it shorter, but also can make it more relevant and personal for its audience—which in turn can encourage higher response rates for both the current project and future surveys.
Tip 2:
Survey the Right People, in the Right Numbers

Make sure to survey the right group of people for your needs. Maybe it’s everyone in your database (a census-type approach), or maybe you just need a sample (a sampling approach). If you take the sampling approach, be mindful of the number of responses required to get a solid indication of how the target population overall would respond to your questions. To help ensure a good sampling, make sure your selection of the population is as random as possible.

For a census-type survey, consider:

- The census approach works best for populations under 1,000 individuals.
- You may need to use incentives to boost response rates to the appropriate level.
- Make sure you invite all respondents.
- Use reminders and deadlines to help ensure the highest response rates among your population.

For a sampling-type survey, consider:

- The sampling approach works best for populations of more than 1,000 individuals.
- This approach helps avoid fatiguing respondents.
- Segmentation can enable you to obtain information on particular subgroups.
Tip 3: Invite Customers to Opt-in to Panels and Personalize the Survey Experience

Inviting customers to opt into panels and treating them as individuals can pay off in higher survey participation rates and more in-depth, targeted customer insight. Think of panels as a living database of customers or focus group, segmented by profile attributes, such as demographics and interests.

Using panels, you can personalize surveys and campaigns based on customer profiles, track success, and manage opt-outs. You can also monitor and grow your panels and avoid over-surveying them. On average, panel-based surveys garner better participation than email-based surveys. Because panel members typically provide about twice the amount of information as compared to non-panel surveys, you can gain deeper insight from your most relevant customers.
Tip 4: Design Surveys for Multi-channel Delivery

Successful survey programs often leverage multiple feedback channels (e.g., email, Web, IVR, mobile, and SMS) to engage the broadest range of customers. While Web-based survey rates may be declining, mobile participation is increasing. The “always connected and mobile” customer can be easy to reach but tends to have little tolerance for poorly designed surveys and may stop providing feedback if not engaged properly. So, it is important to design surveys in device-friendly formats for a range of devices.

SMS surveys also continue to grow in popularity. SMS surveys should include simple, short questions and be limited to only two or three questions. A mix multiple choice and open-ended questions is fine. You can also use local short codes and keywords to invite customers to take a survey—a technique that can help increase response rates while reducing costs.
**Tip 5:**
Craft Your Invitation Carefully

A well-crafted, appealing invitation is essential to increasing response rates. Design your invitation to help minimize the likelihood of being flagged as spam by avoiding language that triggers spam filters, such as “free,” “act now,” and “$$$."

Use compelling and truthful subject lines, valid “from” email addresses, and list a physical address and opt-out link. When possible, send your invitation from an individual person’s email address, rather than a general corporate email address.

**Tips for a well-crafted invitation include:**

- Tell recipients what you want them to do as soon as possible in the invitation.
- Keep it short.
- Let respondents know how long the survey will be.
- Use a combination of incentives and deadlines to help drive a rapid response.

Our experience has shown that once someone clicks your invitation, you have less than eight seconds to make a good first impression! Your customers are busy, but being persistent and respectful can get results. You can respect your customer relationships and avoid over-surveying while still maintaining engagement. Sending reminders can help significantly increase response rates.
Tip 6: Order Questions Logically

There are several types of questions you can ask, such as screening, open-ended and demographic questions. Ordering questions logically and drilling down from general questions to the more specific can help enhance a survey’s effectiveness and improve response rates.

Begin with the most general screening questions, which route people out of a survey depending on answers to initial questions. Open-ended questions are a good next step, because they capture respondents’ views in their own words before biasing them with later questions. Then, move on to general questions that can serve as the basis for branching off into specific questions, depending upon the responses.

After specific questions, you can delve into demographics, which are best used at the end of a survey, since they can be the most tedious. Pre-populate data from a CRM system wherever possible, so information can be updated, rather than re-entered. Then, ask for any final comments, permission to follow up about answers, and whether the respondent has an issue they want to be contacted about.
Tip 7: Write Objective Questions

Poorly worded questions can lead to questionable results and possibly erroneous conclusions. Respondents should not be able to determine where you stand on any topic, so use non-judgmental wording and choose neutral terms.

Tips for writing objective questions include:

- Don’t ask leading questions, such as, What do you like about your service? Instead, ask What, if anything, do you like about your service?
- Remove any ambiguity in your questions.
- Ask about one thing at a time, rather than using potentially confusing questions, such as, How would you rate our price and service?
- Avoid industry jargon.
- Write from the respondent’s perspective and not yours.
- Have others proofread your questions for clarity.
- Consider pre-testing your survey with a segment of your audience.

Best practices for writing response scales have shown that respondents prefer fully labeled scales – they have greater reliability and validity. Five- and seven-point scales tend to have the greatest reliability and validity; however, 10- and 11-point scales are popular. Where possible, use standard scales rather than writing your own.
Tip 8: Shorten the Survey

Now that you have crafted your survey, shorten it! The more questions you have on your survey, the greater the chance that customers will abandon it. Experience has shown that more than half of all surveys are abandoned within the first two pages. So, be as concise as possible and remember the goal of your survey. Go back through the survey and remove any questions that don’t directly address the original goal.

Tips for keeping your survey short and concise include:

- Keep your focus.
- Ask only the most important questions.
- Cut questions that make distinctions only apparent to those within your organization.
- Remove questions that raise issues that can’t be addressed.
- Skip respondents past questions and sections that don’t apply to them.
- Reuse CRM data whenever possible.
**Tip 9: Close the Feedback Loop**

Respondents contribute to surveys because they value their relationship with an organization and want to see it improve. Close the feedback loop after a survey project by sharing findings and identifying the actions you are taking as a result of the survey. You can even use this to stimulate additional participation and ongoing feedback.

**Tips for closing the feedback loop include:**

- Explain what you're using the data for and share it with relevant communities.
- Identify actions you're taking as a result of the survey.
- Consider using Web seminars, video conferences, and meetings to share data.
- For ongoing feedback, consider establishing an online community.
- Use survey alerts and email triggers available in survey software platforms to help improve satisfaction by enabling you to take corrective action based on survey data.

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Survey Success!

These nine tips can help you reap a variety of potential benefits in your next survey project, including increased response rates, more targeted customer data, and greater customer insight. By analyzing and acting on the information you receive, your organization can be in a much better position to increase customer loyalty and repeat business.
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