Four key steps to creating a great customer satisfaction survey

So, you've just been tasked with managing a customer survey. Where do you start? Customer Satisfaction vs. Customer Engagement vs. Customer Experience vs. Customer Retention vs. Customer Service. What do they all mean, and what do they all have in common? Keeping your customers happy, of course, but also keeping your business growing. In order for your business to thrive, you must understand and improve each customer interaction.

Interacting with your customers and addressing their needs is essential. Monitoring customer satisfaction levels and staying informed about their experiences helps you pinpoint strengths, weaknesses and areas of improvement. What makes a customer satisfied, or not? If there are issues, where are they occurring, and what is their cause? And, how can you develop a simple, yet effective customer survey to get to the bottom of these issues?

In this guide, we will cover four core steps to drive any customer satisfaction survey, along with some introductory examples of questions we might use. While your ultimate goal should be a survey experience that matches your brand voice, these steps will get you started in the right direction.

Every successful customer satisfaction survey involves **four core steps:**

1. **Asking the right questions**
2. **KPI tracking**
3. **Closing the loop**
4. **Polishing the process**

In theory, this is simple. And, if you can perfect each of these core concepts, you will be better able to understand, react to and improve customer satisfaction. The end result will be positive change for your business.

1. Asking the right questions

In order to understand your customers' experiences, you must ask about (or observe) them. This breaks down into two parts: deciding what to ask, and when to ask it. Depending on the nature of your business, you can survey customers about their experience immediately after a transaction, or at regular intervals (i.e., once a quarter). Generally speaking, you want your customer to provide feedback as soon as possible after your interaction with them.

Your survey should include four core elements:

- **Overall satisfaction ratings**: This represents a single score, which measures each customer's overall experience. Are they satisfied or not; how do they feel about their experience with your product? This could include questions related to overall satisfaction, likelihood to return or repurchase and/or likelihood to recommend your company to a friend (i.e. Net Promoter Score/NPS). For example:

  How satisfied are you with your FocusVision experience?

  a. Completely satisfied
  b. Very satisfied
  c. Somewhat satisfied
  d. Not very satisfied
  e. Not at all satisfied

- **Performance ratings in specific areas:** This gives you a chance to investigate key areas of the product or service experience. It allows you to find out what's really important to customers, and which areas may need improvement. For example:

  How would you rate your FocusVision experience in the following areas?
  (1: Not at all satisfied – through – 5: Completely satisfied)

  - Courtesy
  - Knowledge / Expertise
  - Quality
  - Timeliness

- **Usage/demographics:** Key behavioral and demographic data can be used for profiling purposes, and allows you to build more tactical customer segments. To gather this info, include questions that help to:

  o Differentiate feedback from customers in different regions, or different types of businesses (business size, industry, etc.)
  o Differentiate feedback from new vs, existing customers. For example:

  How long have you been using Decipher from FocusVision?

  - Less than 6 months
  - 6 months to a year
  - 1 – 3 years
  - More than 3 years

- **Open-ended questions:** These can be very useful, as they let customers express themselves and provide you with a deeper level of feedback. Use open-ends sparingly however, so as not to wear down your respondents. Two-to-four well thought out questions are enough to keep people engaged. It may sound obvious, but be sure to ask questions that will provide you with the information you're looking for. Format them in such a way to invite detailed responses, not single word, or "yes/no" answers. For instance:

  Why did say you were "completely satisfied" with your FocusVision experience?

In general, keep your surveys as short as possible, and give your customers an idea of how long the survey should take to complete when inviting them to join in. Also, be sure to give them an opportunity to opt-in or opt-out of follow-up feedback from you.

2. KPI tracking

The customer satisfaction rating data you will gather from your survey will serve as Key Performance Indicators (KPIs), which should be monitored on an ongoing basis. They also must be shared with members of your team and other key stakeholders. When selecting a survey technology solution, it can be helpful to look for one with strong, built-in reporting capabilities that let you build dashboards and scorecards. These will help to ensure consistent reporting and easy sharing of survey results. These features will also help your team spot trends. Once your KPI dataset is robust enough, you can use it to understand the strongest drivers of satisfaction or dissatisfaction. This information can then help you prioritize changes needed to improve the customer experience.

3. Closing the loop

Now that you've given your customers a chance to provide feedback, how do you act on it? Often, this involves closing the feedback loop. This is especially significant when a customer complaint needs to be resolved. A common method is to send an email response when a dissatisfied customer comes through the survey (assuming that the customer has consented to email contact; something you can build into your survey language). This allows you to contact the customer directly to learn more about and address their complaint. You can create general templates for such responses, but be sure to allow for personalization. Your customer has taken the time to share their thoughts with you, and an implied "form letter" rarely makes someone feel as if they've been heard.

4. Polishing the Process

With every customer complete or support team follow-up, you will be building a database of issues. While some patterns may be obvious or require follow-up, your customers will always manage to surprise you in the ways they use your product or service. As patterns begin to emerge, you'll learn which product or service changes may be necessary to best serve your customers.

A successful customer satisfaction program involves more than just running a survey. It's also a way to connect with the people you do business with. Customers always appreciate knowing there's someone available to listen when they have something to say. Every personal interaction with a customer informs their experience, as well as yours, and serves as a chance to build stronger rapport and loyalty. In the end, you aren't just collecting information, but gathering insights through conversations with the people you value most.

Decipher from FocusVision

If you're looking for an easy, yet innovative survey and reporting solution to handle everything from customer satisfaction programs to more complex studies, check out Decipher. Insights teams from around the world have used Decipher to get to the heart of customer experiences and drive their brands forward.

Learn more at www.focusvision.com/products/decipher/