

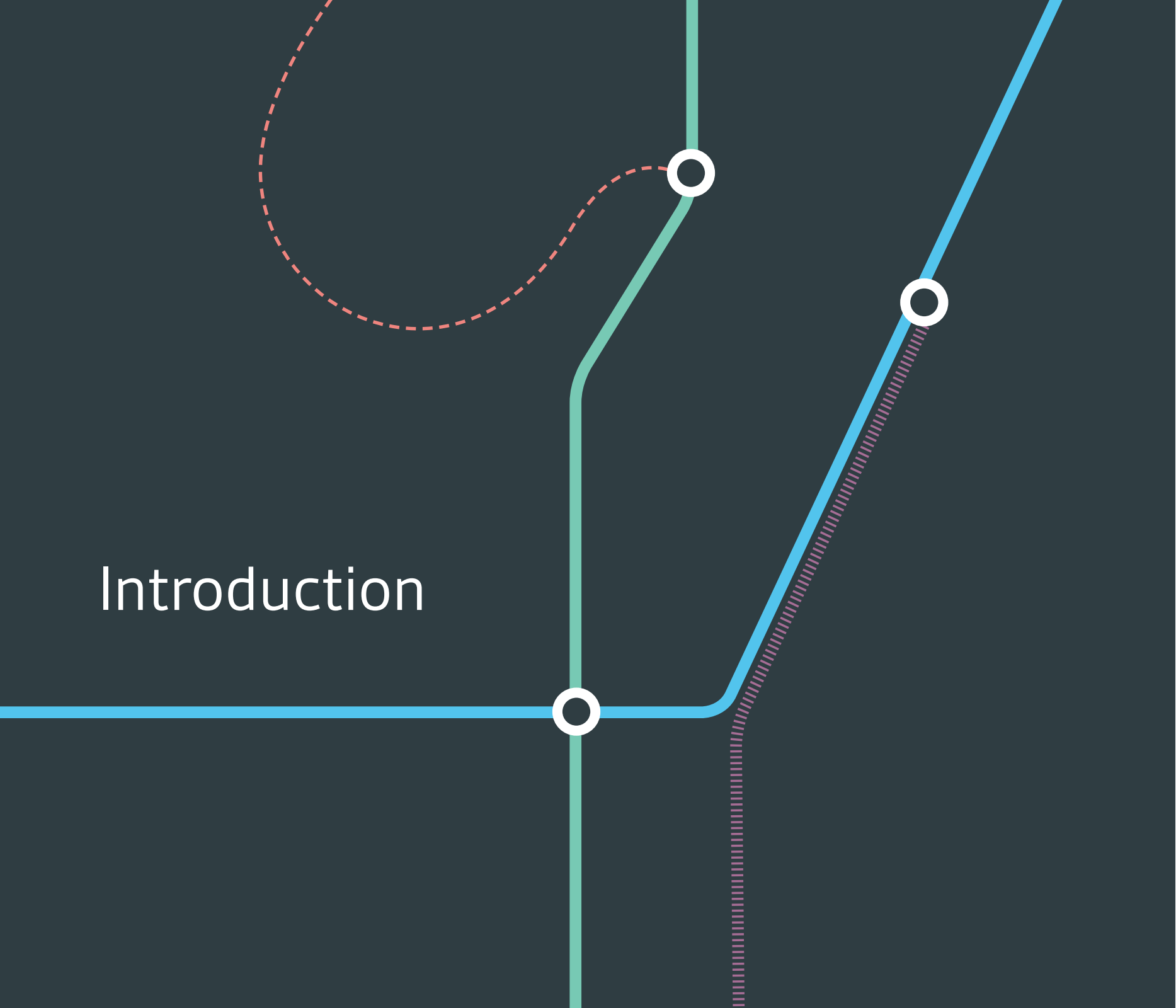
Writing Great Customer Satisfaction Surveys

Part 1: Planning & Fact-Finding

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Introduction



Introduction

The most difficult part of writing a customer satisfaction survey is often deciding what not to include.

Sometimes all you need is a survey that asks just one or two questions. More often, you want or need to learn more from customers about their experience with your company. How do you get answers to the truly important questions without making a survey that takes hours to complete? And how do you ask those questions simply in a way customers will understand?

Making these decisions is not something you can do on your own. You will have to work with people across your organization to ensure that every aspect of your survey serves a relevant business purpose and accurately reflects the journeys your customers take. This collaboration will allow your survey to go beyond the basics such as data collection and closing the loop. It will empower the survey program to drive systemic, ongoing improvement across your entire business by spurring innovation and resolving the root causes of common customer issues.

This e-book covers that collaborative process — specifically the fact-finding and consensus-building work necessary to create a customer satisfaction survey rooted in common business goals. Its companion volume (“Part 2: Writing a Survey”) shows how to translate that information into specific questions, as well as how to refine and improve existing surveys over time.



The Scope of What You'll Learn

At a high level, this e-book will help you identify the most important customer journeys within a certain business unit and create for each one a survey with a concrete business goal.

Some companies may be able to cover all of their key journeys and customer groups with only one round of this process. A luxury accessory retailer, for example, sells a relatively limited range of products. Customers interact with such a company through a variety of channels but, as Figure 1 shows, the core journeys are relatively few.

“Some companies may be able to cover all of their key journeys and customer groups with only one round of this process.”

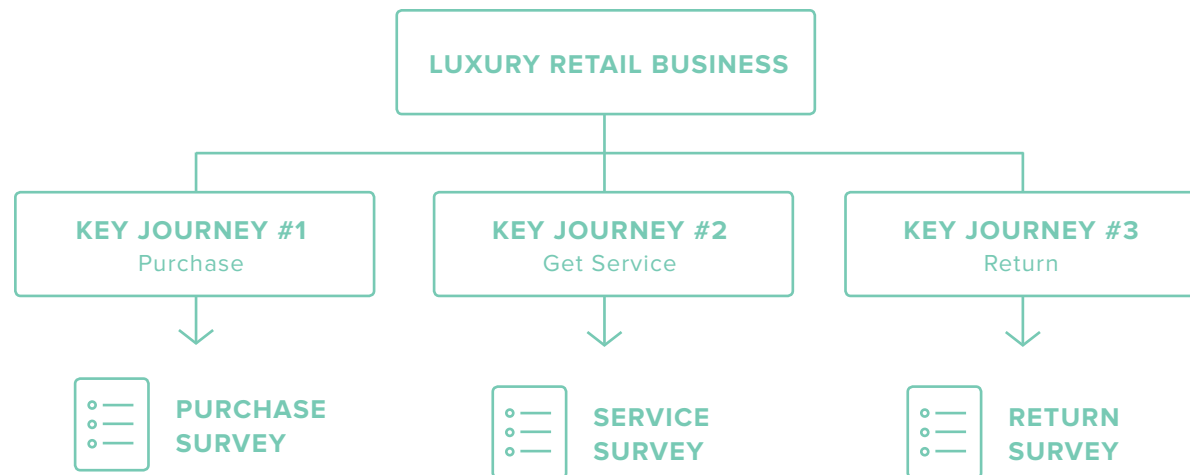


Figure 1: Key customer journeys for luxury retailer

Other companies have more ground to cover. A retail bank, for example, offers a diverse range of products, including checking and savings accounts, personal loans, and credit cards. As Figure 2 shows, the customer journeys in each of these business units are quite distinct, and covering all of them with only one round of this process would quickly become cumbersome.

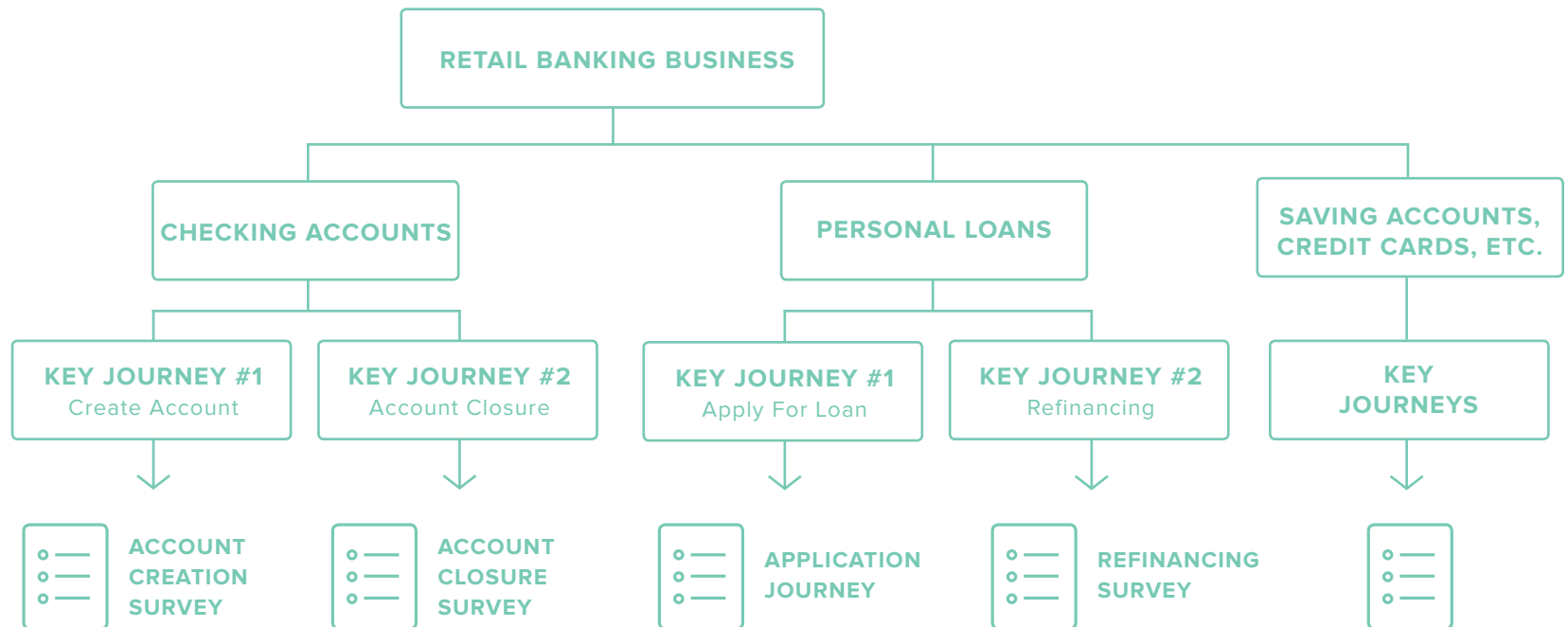


Figure 2: Business units and key journeys for retail bank

This e-book will go into greater depth about the reasons for this organizing structure. For now, you need to know that this process focuses on an organization responsible for a similar selection of products, target customers, and customer journeys. When these elements are common, it is much easier to build a survey program with a specific clearly defined purpose.



CHAPTER 1

The Characteristics
of a Great Customer
Satisfaction Survey

The Characteristics of a Great Customer Satisfaction Survey

As you work with people across your organization to define your survey's goals and determine what it will ask about, it's important to keep everyone on the same page about how the finished product should look.

In order to drive ongoing improvement across your business, your customer satisfaction survey must be:

- **Based on concrete business objectives.** For your survey to spur meaningful change, your entire organization needs to be invested in the metrics it uses and the topics it investigates.
- **Actionable.** If employees can't act promptly on the information from your survey, they're more likely to ignore it.
- **An extension of your company's brand.** When your survey feels like part of the regular customer experience, customers will be far more likely to complete it — and believe that you'll do something with their feedback.
- **Relevant to the customer's experience with your company.** When customers encounter irrelevant survey questions, their answers will be less accurate and harder to understand. They might even lose interest and drop off entirely.

Keeping these qualities in mind will help you make many important decisions as you move through the survey design process.

The background is a solid salmon color. A dark teal line starts at the top left, goes down and right, then right and down, then right and down again, ending at the bottom right. Two white circles are placed on the teal line: one on the first downward-sloping segment and one on the horizontal segment. A dashed teal line starts from the left edge, curves up and right, then down and right, ending near the second white circle. Another dashed teal line starts from the top edge, goes right, then down and right, ending near the first white circle. A vertical dashed teal line starts from the bottom edge and goes up, ending near the first white circle.

CHAPTER 2

Stakeholder
Interviews

Key Stakeholders

As you've probably guessed, creating actionable, on-brand surveys that are based on concrete business objectives and relevant to specific customer experiences requires input from people throughout your organization. The best way to get this input is to talk to key stakeholders one-on-one.

Although these interviews can be difficult to schedule, what you learn will make writing good surveys much easier. Interviews also represent an opportunity to build early buy-in among people whose support you'll need to integrate the finished survey program into your company's operations.

Whom to Talk to and What to Ask

Your interviewees should fit into three broad groups:



Business Leaders: Business leaders in your organization will help you gain consensus about the survey program's business objectives and learn about the high-level journeys customers complete with your company. These leaders should have some measure of authority over the organization's finances and operations as well as the experiences it delivers to customers. For a clothing retailer, the best people to speak to might be directors or vice presidents of retail operations. For the mobile division of a telco, good people might be the division's leaders or their direct reports.



Frontline Experts: They can take you on deep dive into the specific experiences customers have with different parts of the company. These people should have their finger on the pulse of day-to-day customer experiences — for example, the general manager of a hotel chain or auto dealership.



IT Experts: These people will help you understand what customer data your company already has and how you are able to use it.

The exact questions you'll ask each group will depend on your company's organization. But the following pages will tell you what you need to learn from each one.



WHAT TO LEARN FROM BUSINESS LEADERS

These people can help you decide which business goals your new survey should contribute to. Generally, you'll find that these goals fall into four categories:

- Using customer voices to identify and fix problems with your existing offering and experience
- Closing the loop with customers to address the issues putting their loyalty at risk
- Improving the performance of individual employees through coaching and training to help them stay accountable for delivering good experiences
- Identifying ways to improve your offering and experience through innovation

In these conversations, cover the metrics and objectives these leaders care about most, and ask which customer insights would help them and their teams succeed. Additionally, ask for each leader's thoughts about existing surveys and the need for new ones. What's working well? Who needs access to survey findings but doesn't have it? What actions should the new surveys drive?

Finally, ask these leaders for a high-level overview of the key journeys their customers take, including an explanation of which journeys are the most important for your business. This overview will guide the in-depth conversations you have during your next set of interviews.

“What's working well? Who needs access to survey findings but doesn't have it? What actions should the new surveys drive?”



WHAT TO LEARN FROM FRONTLINE EXPERTS

Use these interviews to gain detailed insight into the key customer journeys the business leaders identify. What needs do customers bring to each one? What are the most important drivers of quality and satisfaction at various steps in the journey? What are the most common sources of friction and dissatisfaction? This information will ultimately help you write surveys that are relevant to your customers and actionable for your business.

Additionally, ask frontline experts how your organization collects and manages feedback after various customer interactions. Who responds when a customer raises a concern? Who handles the escalation when a tricky situation comes up? Understanding these processes — including how well they work — will help you write a survey that fits conditions on the ground and allows frontline employees to respond effectively to individual concerns.



WHAT TO LEARN FROM IT EXPERTS

You should cover three main topics in these conversations: what data your company has about your customers, how that data is organized, and the different ways in which you're able use it.

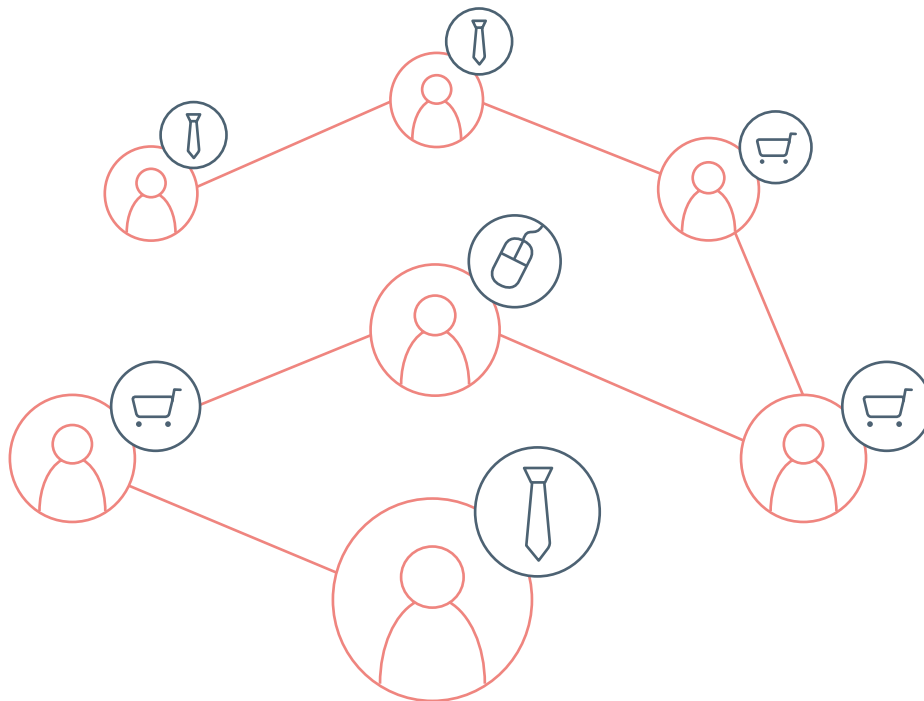
As part of their grounding in concrete business goals, the best customer satisfaction surveys reveal drivers of loyalty, spending, and other important customer behaviors. Achieving this requires the ability to combine survey feedback with other demographic and behavioral information. Learn now what information you already have so you don't have to ask for it on your survey, which can increase friction and abandonment.

Additionally, since your conversations with business-unit leaders should have surfaced requests about new customer insights they'd like to see, you should speak to IT experts early and get a sense of what data linkages will be possible.

“Who responds when a customer raises a concern? Who handles the escalation when a tricky situation comes up?”

Logistical Tips

- Conduct stakeholder interviews at the very beginning of the survey design process. The information you collect will be crucial for completing later stages.
- If interviewees request specific survey questions, ask them to explain instead what decision the question would help them make. You might be able to find another, more effective way to meet their need.
- Don't interview multiple people at the same time. Taking a deep dive into someone's area of expertise is much more effective one-on-one.
- Some redundancy in choosing stakeholders to interview is fine, especially if the extra person is someone you'll need buy-in from later on.



What You Should Have After the Interviews

While the information you learn during stakeholder interviews will be broadly useful throughout the design process, you should have four specific things before moving to the next stage:

- 1 Definition of each survey's business purpose**

These definitions — which should fit into a single sentence — will guide your thinking throughout later stages. They should stem from the needs and goals expressed by various business leaders.
- 2 List of key customer journeys**

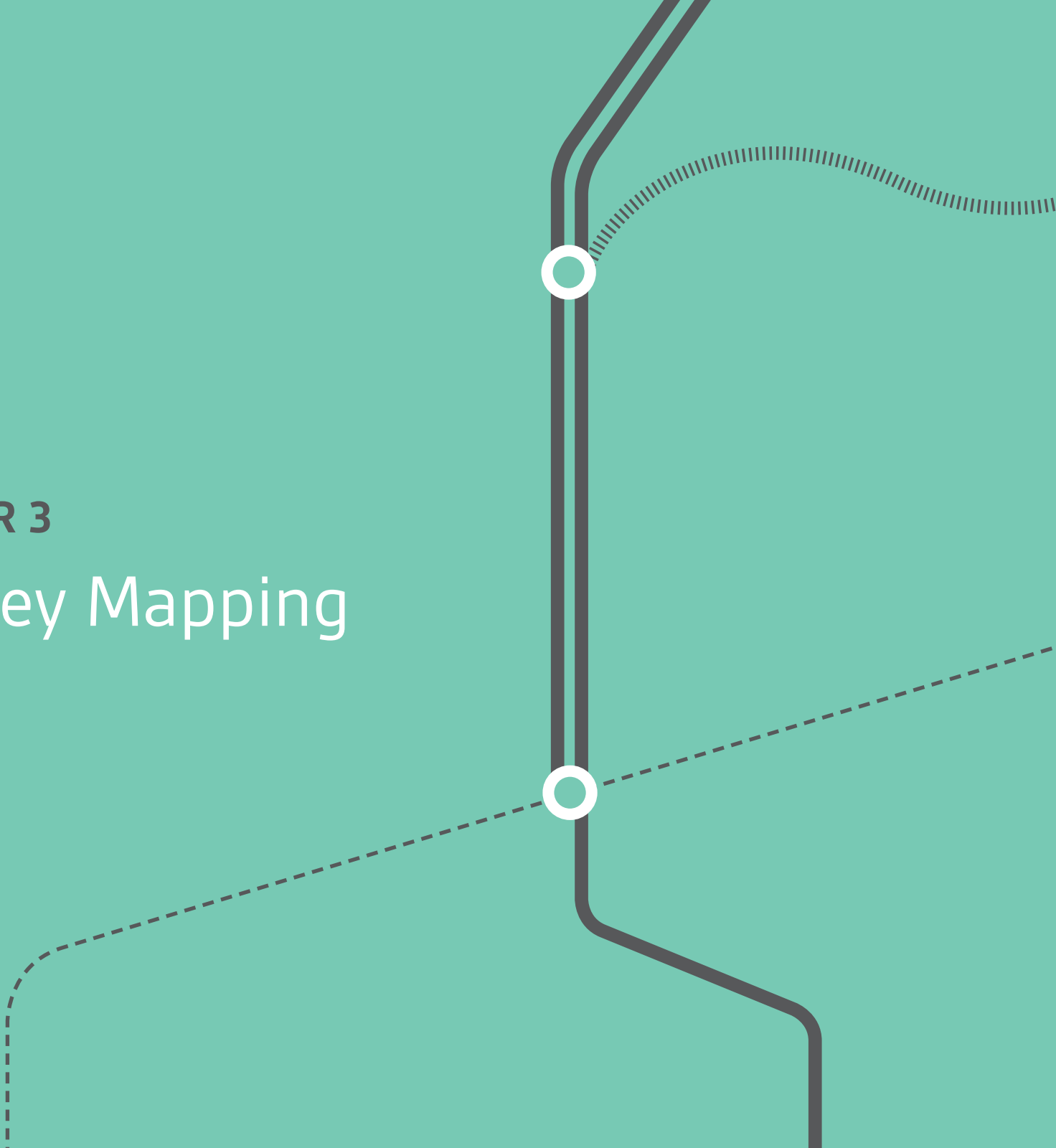
This list should include the customer types each journey is associated with and detailed information about what drives quality in each one. Use information from frontline experts to flesh out each journey identified by business unit leaders.
- 3 Description of how your company uses survey results**

This information will come from business leaders and frontline experts.
- 4 Information about other kinds of available customer data**

This should include the ways in which you're able to combine feedback with other kinds of customer data. This information should come from IT experts.

CHAPTER 3

Journey Mapping



Mapping Customer Journeys

You've now gained an understanding of how your survey program can contribute to your company's business goals. But to determine what parts of your customers' experiences to ask about, you'll need to analyze those experiences in more detail. This is best done through journey mapping — the process of grouping interactions into coherent journeys based on single customer objectives.

Journey mapping is most effective when you do it with a cross-functional group of customer experts from every part of your company or business unit. This will ensure that the journeys you identify truly reflect the experiences customers are having and that they incorporate the customer's point of view.

Depending on the scope of your design process, it is often helpful to validate these journeys with several customers to make sure you're not missing anything.

Journey Mapping Terminology

The following terms will be useful in explaining different aspects of the journey mapping process:

- **Customer life cycle:** The entirety of a customer's interactions with your company, from the time he or she initially engages with your brand through the choices he or she makes to come back again, renew, spend more, or cancel.
- **Journey:** An experience focused on a single customer objective (e.g., purchase, return, receive support) accomplished through a series of steps.
- **Journey step:** A specific step the customer takes to accomplish an objective (e.g., research, compare, select, pay, receive).
- **Channel:** A way in which a customer can interact with your company at various steps (e.g., website, store, call center).

What Makes a Good Journey Map?

Customer journey maps should represent the customer's point of view. This means both the overall journey and its individual steps should describe in the customer's own words what he or she hopes to accomplish, rather than the actions your company performs.

Take a company's support hotline, for example. Customers calling the hotline might interact with representatives from several departments before they accomplish their goal. But from their perspective, this is all part of one journey to "get help." Interacting with each department is not a separate journey for the customer. If your journey map does not reflect this view, it will be harder to use in developing survey questions the customer will easily relate to.

Additionally, good journey maps should distinguish between the steps customers take and the channel they use. Not doing so can add unnecessary complexity to the mapping process and can distract you from the customer's perspective.

Identifying Key Journeys

To start the journey mapping process, work with your cross-functional team to outline a high-level customer life cycle for your company or business unit. Remember that this life cycle should include every interaction customers have with you. Describe these interactions in the customer's words. Do not segment the life cycle into journeys yet, and list each type of interaction only once, even if it occurs multiple times. Figure 3 and 4 show examples of customer lifecycles.

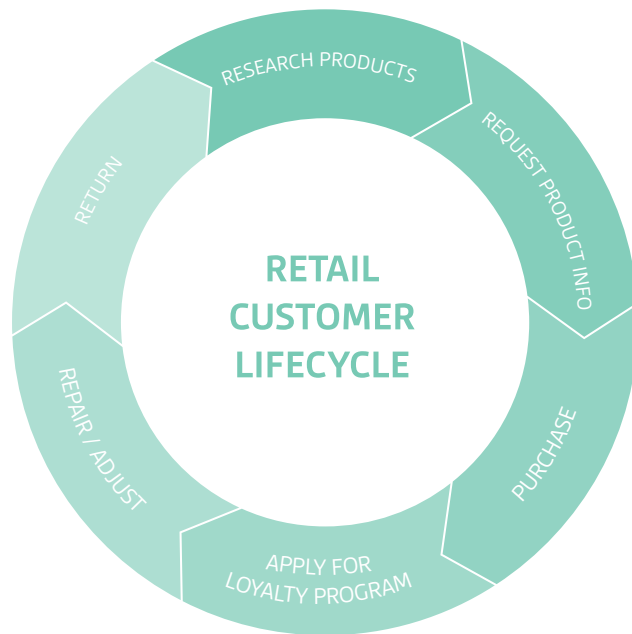


Figure 3: Retail Customer Lifecycle

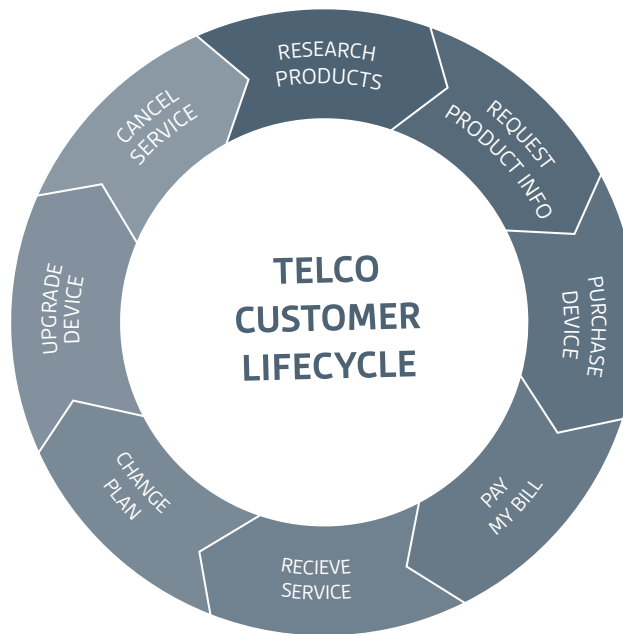


Figure 4: Telco Customer Lifecycle

As mentioned at the beginning of this e-book, companies with differentiated business units (for example, enterprise and consumer offerings from a large software company) will likely have multiple customer life cycles. However, combining experiences from similar customer segments — who buy products or services that are comparable on a high level — will help you identify important similarities between various customer journeys.

Once you've outlined this life cycle, think back to your stakeholder interviews with business leaders. Which journeys in that life cycle did they say were most important? If they did not identify an unmanageable number of journeys, you are ready to move on to the next step. Before you do, though, you should again make sure each journey is consistent with the customer's perspective.

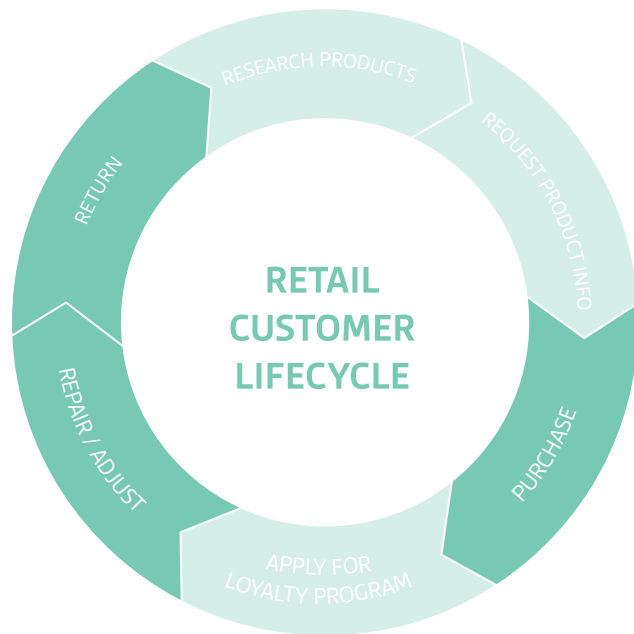


Figure 5: Key Journeys in Retail Customer Lifecycle

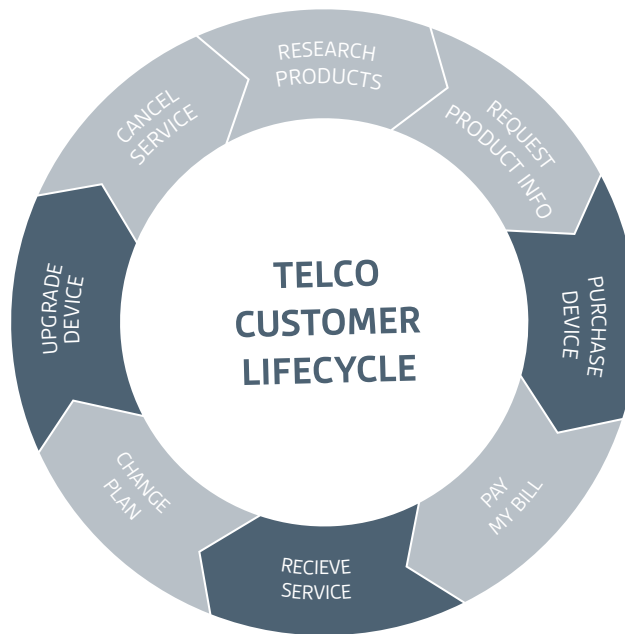


Figure 6: Key Journeys in Telco Customer Lifecycle

If your business leaders did identify numerous journeys — often more than four or five, though the exact number varies by company — as critical, now is the time to decide which ones are truly the highest priorities to address with your survey program. The following factors will help you evaluate individual journeys:

- **Frequency:** Do customers complete the journey often?
- **Engagement:** Is the journey of high importance to the customer? Will the journey's outcome significantly impact the customer's satisfaction, finances, or well-being (e.g., a repair, a purchase, or an insurance claim)?
- **Business impact:** Will the journey's outcome play a significant role in your company's success?

The more closely a journey matches these three factors, the higher priority it should be for you to cover in your survey program. It is worth checking back with your business leaders upon doing this exercise to make sure that they buy into your selections.

Whether or not you have had to reprioritize the customer journeys your business leaders identified, now is also a good time to reexamine your entire customer life cycle to make sure you haven't overlooked anything. In particularly complex businesses, forgetting to take a certain journey into account happens more often than you might imagine.

Mapping and Investigating Key Journeys

Once you have outlined your overall customer life cycle and identified the four or five most impactful journeys in it, map out the steps and channels customers use to complete each one. Figure 7 represents an example of this process.



Figure 7: Mobile phone purchase journey

While you map these journeys, work with your team to gather and summarize additional information about each one. What does the customer expect from the journey beyond its ultimate objective? Which specific aspects of the experience — from product quality to storefront cleanliness to employee demeanor and knowledgeability — determine whether it meets those expectations? Are there any organizational or external problems that commonly get in the way?

This information — which will come from your stakeholder interviews and your team’s own on-the-ground experience — will help your survey design team decide which aspects of the various experiences specific surveys should ask about.

What You Should Have at the End of the Mapping Session

- 1 A list of key customer journeys for your company or business unit
- 2 Relevant information about each journey, including what customers expect from it and what commonly allows or prevents those expectations from being met

The Survey Framework

By now, you've gathered a lot of information about the experiences customers are having over the course of their life cycle, and how your survey program can help you understand and improve those experiences. Now it's time to put that information into a format that's well suited for survey design.

This summary, or survey framework, will describe how each survey will work — including sampling and scheduling guidelines, the channel and format you'll send it in, and the basics of what the survey will ask customers. With those three elements, you'll have the information you need to write surveys that blend seamlessly with the rest of your customer experience, incorporate the needs and opinions of key stakeholders, and align with stated business goals.

Sampling and Scheduling Guidelines

Sampling guidelines should cover three factors: when you'll send surveys, who will receive them, and strategies for keeping survey responses timely.

WHEN TO SEND SURVEYS

Each survey needs a trigger — an action or event that determines when it will be sent to the customer. The best trigger is often the point at which the journey is complete from the customer's perspective, since it allows you to ask about the experience as a whole rather than focusing only on specific steps. [sidebar link]

Refer to the information you collected in previous stages in order to make your trigger fit the customer's actual experience. From a company's point of view, an online purchase journey might be complete once the product ships. But sending a survey the moment this happens will only confuse the customer, whose journey is not finished until the purchase arrives.

Now is also the time to decide how often you'll send the survey. Does the journey's importance warrant sending a survey whenever a customer completes the trigger? Or will you wait a certain amount of time between surveys to avoid survey fatigue?

When making this decision, remember that surveys are likely only one of several ways your company communicates with customers. In this e-book's companion volume, you'll learn ways to make surveys more appealing for customers to open and complete. If your survey cadence results in too many messages, however, customers will be more likely to ignore them or opt out of communications entirely.

WHO SHOULD RECEIVE SURVEYS

There are two ways to decide whom to survey. Using a census approach, you survey every customer who completes your desired trigger. Meanwhile, a more targeted strategy takes a representative sample of customers that has enough volume to support decision-making.

When choosing between these approaches, consider how much bandwidth your company has to handle and respond to individual surveys. If you're committed to closing the loop on every piece of customer feedback, you might want to avoid a census approach until you're staffed to handle large survey volumes. Additionally, consider how frequently you are surveying customers overall. Reaching out to every customer every time he or she completes the trigger action might overwhelm your customers and make them stop responding altogether.

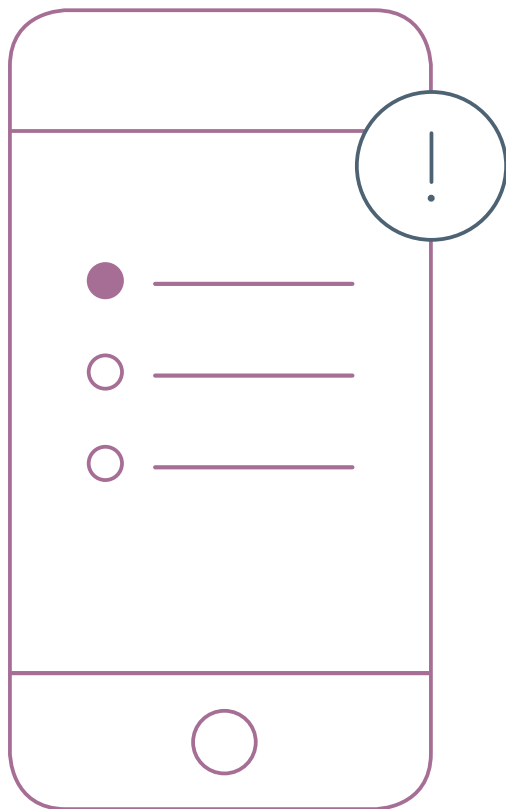
MAINTAINING CONSISTENCY AND TIMELINESS

Survey reminders can help you capture customers who overlooked your initial survey request — but be careful not to go overboard. Surveys about particularly critical journeys might warrant a reminder, but the same approach to less important journeys could irritate customers. When making this decision, think back to the journey prioritization you completed during the journey mapping activity.

Survey Channel and Format

As we explained in the introduction to this e-book, good customer satisfaction surveys reflect your brand and blend seamlessly with the rest of your overall customer experience. The channel through which you send a survey — the “survey mode” — helps ensure that continuity. Now that you’ve chosen survey triggers, you should also choose modes that will complement the customer’s experience at each of those steps.

When making this decision, consider what would be most convenient for the customer at that step in the journey. For example, if you’re trying to capture feedback soon after an in-store experience, a mobile-optimized survey might allow the customer to provide feedback while the interaction still feels fresh.



What the Surveys Will Ask

Once you've laid out sampling guidelines and identified a survey mode that fits your chosen trigger, it's time to decide what each survey should actually ask.

While it would be inefficient to involve business leaders and frontline experts in the nitty-gritty work of writing actual survey questions, there are aspects of its content — specifically key metrics and drivers of customer satisfaction — that you'll want to get everyone's final agreement on before you start writing.

KEY METRICS

Your interviews with business leaders should have covered the outcomes most important to the business (for example, renewals). With an understanding of this key outcome and how the company measures it (for example, renewal rate), think about what you can ask the customer to help you understand it (for example, “How likely are you to continue doing business with us in the future?”). This key metric should stem directly from the survey's business purpose, and should be something everyone will be able to understand and rally around.

DRIVERS OF SATISFACTION IN EACH CUSTOMER JOURNEY

These qualities can include everything from employee helpfulness to product quality to store cleanliness. You should have identified many of them during your journey mapping process. Now is the time to decide which ones matter most.

This is a decision you should make with the help of your frontline experts. Winnowing all of these drivers down to two to four key elements can be tricky, but getting everyone on the same page now will save you a lot of friction and revision later. Focus on drivers that, when you ask about them, will provide insights you can use to fulfill the survey's ultimate business purpose.

If your journey mapping process identified any external factors that impact the customer's experience in the journey at hand, summarize them now as well.

“While it would be inefficient to involve business leaders in the nitty-gritty work of writing actual survey questions, there are aspects of its content... that you'll want to get everyone's final agreement on.”

What Your Finished Survey Framework Should Include

For each survey your design team writes, the framework should include:

- 1 **Sampling Guidelines:** A description of sampling guidelines, including:
 - The survey trigger, including any operational details the design team will need to match the survey to the customer's actual experience
 - Customer targeting guidelines (if applicable)
 - Guidelines for survey reminders
- 2 **Survey Mode:** A description of the survey mode
- 3 **Content Guidelines:** Basic content guidelines, outlining:
 - The key metric the survey will use to measure the overall quality of the customer's experience
 - Succinct drivers of customer satisfaction for the journey being assessed
 - External factors that impact the journey's quality

Reflection &
Next Steps



Reflection and Next Steps

Congratulations — you’ve collected the information you need to start writing a survey! But before you dive in, it’s helpful to step back and take stock of everything you’ve learned.

Think back to the four qualities of a great customer satisfaction survey. Do you have the information you’ll need to achieve each one?

1

BASED ON CONCRETE BUSINESS OBJECTIVES

What you should have:

- A single-sentence definition of each survey’s business purpose
- Content guidelines — particularly the broadly applicable metric with which each survey will measure overall performance

2

ACTIONABLE

What you should have:

- A description of how you’re able to combine customer feedback with financial and operational data to create useful insights
- A description of who is responsible for acting on different types of survey data

3

RELEVANT TO THE CUSTOMER’S EXPERIENCE WITH YOUR COMPANY

What you should have:

- A list of key customer journeys
- Content guidelines, particularly the drivers of customer satisfaction for each journey
- Sampling guidelines

4

AN EXTENSION OF YOUR COMPANY’S BRAND

What you should have:

- Survey modes that blend well with customer experiences at your chosen triggers

With these elements in hand, you're ready to start writing surveys. That's where the next volume of this guide comes in. It describes how to translate all of this information into great survey questions and how to structure those questions in a way that will elicit useful responses and make customers feel supported.

You can find it [right here](#) if you don't have it already.

If you have any questions or comments about what we've covered so far, feel free to contact us at engage@medallia.com.

About Medallia

Medallia® is the Customer Experience Management company that is trusted by hundreds of the world's leading brands. Medallia's Software-as-a-Service application enables companies to capture customer feedback everywhere the customer is (including web, social, mobile, and contact center channels), understand it in real time, and deliver insights and action everywhere—from the C-suite to the frontline—to improve their performance. Founded in 2001, Medallia has offices in Silicon Valley, New York, London, Paris, Hong Kong, Sydney and Buenos Aires. Learn more at www.medallia.com.

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