

CUSTOMER SURVEY



You might find yourself in a situation where, despite your enthusiasm, internal stakeholders are sceptical about outsourcing your survey to an agency. In this article, I will take you through some of the challenges and questions that you are likely to face and how you might respond to provide reassurance.

Some stakeholders may feel anxious or concerned about customer surveys and securing 'buy in' is important; sharing information can provide reassurance. When running or outsourcing a survey for the first time it is not unusual to feel a degree of trepidation. Stakeholders can feel exposed and, as a result, nervous.

Any concerns are generally because stakeholders care about what customers might reveal or disclose about both organisational and personal performance. They may feel a lack of control over the approach, the feedback and the results.

Here are some of the questions and challenges that crop up frequently.

“Why are we doing this? We don't need to do a survey. We already know what our customers think”

- *Could be true. If you do know what customers think that's great news; the survey results will confirm if that's the case.*
- *Even if you do have a good understanding of what customers think (and I would hope, to some extent, that you do), you are unlikely to know everything.*

- *Uncovering just one or two 'gold nuggets' of insight, opinion, or perceptions could be invaluable and make the survey worthwhile.*

“Why outsource to an external agency? As our customers know us, aren't we better doing this internally?”

- *Investing in and engaging an independent specialist sends the signal to your customers that you take the exercise seriously; it demonstrates your commitment.*
- *Customers will speak more openly to an independent third party; they can also give feedback that they may not feel comfortable sharing directly (this includes positive feedback as well as more critical feedback).*
- *A specialist agency can help with questionnaire design and conduct analysis specific to this type of exercise and provide a range of results and context around the findings that may be difficult or impossible to generate internally. They can usually do this more quickly too.*
- *Running surveys in-house takes time and effort. All things considered it can be cost effective to hand the responsibility to an outside party leaving you to concentrate on the day job.*

Who is this agency? Can we trust them?

Regardless of which agency you are working with, gather some facts and figures to support your case. All reputable agencies will willingly share this information.

- Where is the agency based? What is the history?
- Are they specialists or generalists?
- Are they sector specific?
- Who do they work with? Who are their clients?
- How did you hear about them?
- What are they going to do for you?
- What is their capacity? What do they do in-house... what do they outsource?
- How do they handle confidentiality and information security? What are their credentials? (Market Research Society (MRS), ISO, GDPR compliant, data sharing protocol etc.)
- Are they accredited? What for and by whom? (MRS, ISO)
- What have you asked them to do and what was their response?
- Why have they been selected?
- Who are we going to liaise with?
- Do we have a dedicated project manager?
- What are we going to receive at the end?
- How will they share results with us?

It might be useful to invite a representative from the agency to a meeting so they can talk to stakeholders directly and answer questions.

"Our customers won't want to take part. Being approached will upset customers!"

- In our experience, customers are happy to provide feedback. They like to talk about themselves and their experiences. This is particularly the case if the questionnaire is relevant, which satisfaction should be.
- It is in your (and customers') interest to gather feedback that can lead to improvements; customers will understand this. Ultimately, customers will benefit from giving feedback and they will know this. This research will provide valuable information. The findings will uncover opportunities and inform strategy.
- Positioning the exercise as positive and

assuring customers of the importance of the exercise improves response. (This is one of the reasons we strongly advise 'warming up' customers). They will be happy to take part if they are confident.

- Remember customers will provide positive and motivating feedback as well as constructively critical feedback. The survey is not designed to gather criticism; it is designed to provide an honest appraisal of performance. This includes generating recommendations for positive change that will benefit your organisation by building loyalty.
- Your agency's credentials, and past success, will prove useful. A few stats might help here. How many surveys do they run? How much response do they handle? What is their experience? Stakeholders can be persuaded that customers do respond, as the numbers prove.
- In our experience, business (B2B) respondents are excellent interviewees. They understand the seriousness of feedback and give considered and logical feedback. Consumers (B2C) are comfortable engaging and providing feedback too, especially when approached by a friendly and experienced interviewer.
- Customers surveys are not 'cold calls' as the customer will be familiar with the company name (and ideally has been 'warmed up'). For those sceptics who say 'I never take part in surveys!' the evidence shows that they're in the minority.
- In our experience stakeholders are generally more concerned about an agency making contact than customers are. When this stage of the process is managed correctly, customers welcome being given the opportunity to share their views. Research demonstrates that customers value being asked to give their feedback, even if they don't take up the offer.

When are calls (or contact) going to be made? What if the customer isn't free to take part when they call?

Stakeholders are often concerned that customers will be strong-armed into taking part in an interview regardless of whether they have time or not. Agencies are not allowed to do this (rules and regulations prohibit) and also any reputable agency will not want to upset customers. Again, a few facts can be useful for internal discussions:

- Dates for when the interviewing (or survey) will start and stop.
- If relevant, calling hours. Again, any reputable agency will adhere to the MRS rules which stipulate permitted calling hours.
- The number of call attempts (e.g. how many calls will be made in efforts to get hold of customers to maximise response?)
- Any arrangements agreed with the agency (e.g. will the agency make appointments?)
- Interviewers can tune into how customers feel, they are emotionally intelligent and will pick up when a customer seems in a rush etc., they will not push through an interview with a reticent customer.
- If relevant, some background information about the interviewer incentive (e.g. interviewers are not paid per interview so they will not be racing against the clock.)

Does the agency know anything about what we do? What if they get asked a sensitive question?

- In most cases the agency will understand your organisation (or they should do) however, they will not know the intricacies of specific situations or cases. Customer surveys are not overly technical by nature so this is unlikely to arise. In fact, customers would be more likely to be concerned if an agency did know specific details (bearing in mind confidentiality issues etc.). No confidential information is shared with agencies.
- Your agency may conduct interviews for many niche providers and these examples may provide valuable examples to demonstrate that customers are unlikely to expect any agency to have detailed technical knowledge. In fact this is an advantage, as they will not be defensive when faced with negative feedback; they are impartial. If an agency has sector knowledge that could be very useful during planning and implementation as they know what to expect. Agency and client will discuss what should be expected and might crop up, broadly speaking, during interviews. An understanding of the client organisation, what it does and how it does it, is an essential part of the set up and project management...and, of course, the questionnaire design.

- Interviewers will not be drawn into conversation around specific technical details although they will listen if customers want to explain. B2B customers are intelligent and understand this. Customers do not expect an agency to be experts.
- Interviewers will be briefed with background for each survey, the objectives of the survey etc. so they understand the type of respondents they are likely to speak to.

What if our customers want to be anonymous? Will we still get their feedback?

- Agencies are obliged, due to rules and regulations, to offer respondents the option for their feedback to remain anonymous. Customer responses will still be shared but in a way that does not identify the customer.
- Other feedback will usually be linked to respondent details to enable themes to be identified and provide useful segmentation.

What if a customer is unhappy? Will taking part in the survey inflame their dissatisfaction?

- In our experience interviews with unhappy customers are productive. Respondents can be balanced and logical, they have plenty to say, and even give the organisation credit for seeking feedback knowing that the relationship isn't perfect. It can be cathartic for the customer.
- Most agencies will operate a 'hot alert' system, meaning the client organisation is alerted quickly if a respondent is extremely unhappy (and waives their anonymity). This gives the organisation the opportunity to resolve any issues without having to wait for the report. This system is designed for extreme cases only.

How long does the interview last? How many questions are asked?

- In many cases, the questionnaire is not based on a number of questions; it is based on time taken to conduct an interview. This is because one open question could potentially take longer to answer than ten scored questions.
- The questionnaire is designed to go through in a specified time (usually no more than 10 minutes)

although it depends on what the customer has to say and the depth of their answers. This is explained in the introduction. It is amazing how much ground can be covered with a well-designed questionnaire.

- Often if the survey is longer than 10 minutes this is customer initiated. Put simply, most agencies let the customer dictate the pace. They do not stop customers talking if they have plenty to say.
- The questionnaire will be based on the survey requirements (and not all surveys are the same). Customers may be asked a range of questions: for example satisfaction, importance, loyalty, competitors, and complaints. Pre-coding and routing makes the questionnaire quicker to navigate. They are only asked relevant questions. The questionnaire will be approved before interviewing commences.

What results will we receive afterward? What is the report like?

- At any meeting it is useful to provide dates so employees understand there is a plan and the plan will be adhered to. They also need to know what will be expected of them and when. They are part of the plan.
- Explain the format and content of reporting, how it will be shared internally and, subsequently, who will be privy to confidential information.
- If the agency is presenting results allow staff to attend so they can ask questions. It is sensible to do a preview of the survey with key members of the team involved first in order that the results can be considered prior to sharing.

Explaining the process and answering questions openly can reassure internal stakeholders that the benefits of outsourcing are numerous. When it works well, client, customer, and agency can create a strong and productive working relationship that benefits all parties.



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