

# Warming up

IMPROVE RESPONSE RATES and quality of response through effective pre-survey communications.

A well executed warm up campaign will make your survey more cost effective by shortening the field work period (achieving interviews or responses more quickly) and increasing the response rate. It could also stimulate response from a wider range of customers, generating a more representative result and improve the quality of feedback by making participants more engaged with the survey.




---

“... selling the benefits of taking part in the research in the warm-up should act as an encouragement to take part”

---

### Warming up staff – why it matters

It can be embarrassing if the first staff hear about the survey is from customers. This reflects badly on the organisation and is demoralising for staff who wonder why they have not been informed. In markets with strong customer-supplier relationships staff can also play an important part in encouraging customers to participate.

#### What to tell staff

- Staff should be in no doubt of the importance of the survey and its role in the organisation’s plans. Staff need to know the survey will measure performance and the findings will be used to make improvements. The survey gives the organisation an opportunity to highlight to staff the link between satisfaction and loyalty and its impact on the organisation.
- Staff may need to answer questions from customers to give them enough information to deal with queries. This may include:
  - survey schedules including when the survey is starting and finishing, when the results will be available, how results will be shared and what will happen afterwards.

- how the data will be collected (i.e. telephone, web etc.), who is conducting the research, what time of day contact might occur. Establish the credibility of the agency with staff.
- an understanding of what customers should expect. Staff do not need to understand the intricacies of the methodology but an idea of what customers will be asked is useful. For example, knowing customers will be asked to give scores and encouraged to make comments about products and services. For some industries reassurance that customers will not be asked for personal or financial information may be important.
- Customer facing staff need to understand how they can encourage participation, e.g. being positive about the benefits for customers. It is important staff do not try to influence customers’ responses by suggesting negative or positive feedback.
- Staff may assume customers will not like being approached to take part. In our experience, customers are happy to take part if the survey is well designed. Customers often tell us they enjoyed the experience, even when they are dissatisfied with the

organisation. Less satisfied customers are often those who most welcome the opportunity to say what they think. Interestingly, research shows that being invited to take part in a survey can improve customer satisfaction. It conveys the message that the organisation cares about customers, is not afraid to seek feedback and values customers’ opinions.

- Staff can be afraid of the repercussions from survey findings. Management should allay staff fears around how the results will be shared and handle feedback responsibly, particularly verbatim comments which may refer to staff by name. Customer feedback can support staff as it often reflects their own thoughts or ideas.



**Rachel Allen**  
Client Manager  
TLF Research  
rachelallen@leadershipfactor.com

### **Warming up customers – why it matters**

More customers will take part in a more committed manner if they understand the purpose of the survey and the potential benefits for themselves from taking part. One of the main reasons warming up matters is that it can help customers overcome the negative attitudes they may have about taking part in a survey. The reasons can be addressed in the warm up communication.

### **What stops customers taking part in the survey?**

- Suspicion – who are we talking to and where did you get my details from?
- Personal details – customers need to be confident that their contact information and responses, which are confidential personal information, are going to be treated 'properly'. This means assurances about data protection compliance and the offer of respondent anonymity (which can be assured through the Market Research Society Code of Conduct)
- The introduction – in our experience a wordy introduction puts customers off taking part. Customers do not want to hear a lengthy explanation of why the survey matters. They decide to take part quickly and want to get on with the questions so if they've already been warmed up a telephone or online introduction can be very short
- The questions – if the content is irrelevant or uninteresting customers will opt out. If a postal survey is difficult to read or fill in it will not get completed
- The interviewer – a pushy or intimidating interviewer can scare off customers
- Past experience – 'Nothing happened last time I gave feedback' or 'Last time I did a survey the company was trying to sell to me'
- Fear or lack of confidence – worry that the survey will take a long time or they won't be able to answer the questions.

### **What encourages customers to take part in the survey?**

- Customers want to believe the organisation is prepared to make changes from which they will benefit and that performance will improve their experience based on feedback. Assure them of this.
- Customers need to be reassured that giving their opinion will require no effort and the process will be straightforward. For a telephone survey this may involve call-backs and appointment setting. For postal surveys this may involve provision of a business reply envelope. This may extend to surveying in foreign languages or providing large print versions of questionnaires.
- Customers need to feel that they can say what they think without challenge or repercussions. The interviewer needs to allow the customer to share their views. For other collection methods, such as post or email the customer should be given the opportunity to make comments and explain their scores with an open question.
- Customers will be engaged in the survey if the questions are interesting to them. This means asking relevant and unambiguous questions designed around what matters to customers.
- Customers need to know what is going to happen with their responses and how their information will be used. The MRS Code of Conduct stipulates that data can only be used for the purpose for which it was gathered. This means that it cannot be 'abused' e.g. used for selling or marketing purposes (without their explicit agreement).

### **Opt outs**

Is it worth giving customers a number to call so they can 'opt out' of taking part in the survey? In our experience, this is unnecessary and creates additional work because resource is required to handle incoming communication and update databases. This approach can also adversely affect response rates and add weeks to the survey schedule. Furthermore, customers may rule themselves out of taking part when a call from a skilled interviewer would have elicited feedback. Organisations sometimes offer 'opt out' to prevent upsetting their most valuable customers when these are actually the customers whose feedback they should be encouraging most.

## Incentives

We do not recommend offering incentive payments apart from for focus group attendance. It can be difficult to decide on an appropriate incentive suitable for all customers. This is further complicated by rules and regulations around what can be offered (e.g. organisations cannot offer vouchers for their own products). B2B customers may be forbidden from accepting incentives. Incentives may also influence customers' responses although this will be impossible to determine. Instead, selling the benefits of taking part in the research in the warm-up should act as an encouragement to take part.

## What to tell customers?

Use the warm up communication to tell customers:

- Why you are conducting a survey and the benefit to them of taking part – e.g. to help you understand what you need to do differently to meet their needs and satisfaction
- An outline of the approach – how contact will be made
- What you would like them to do and when – e.g. take part there and then, make an appointment for a convenient time or return a questionnaire
- Whether they will get feedback about the survey findings. This can be a powerful incentive to take part especially in B2B and special interest markets
- What you will do with the survey results – i.e. use the findings when making plans or changes
- Who you are and how they can contact you – introduce the agency and provide names and numbers to avoid suspicion
- Consider the signatory – the person signing the letter needs to carry weight, conveying the importance of the survey to customers.

Customer Name  
Address  
Address  
Address

Reference number: 211085

21 October 2015

Dear Customer

It is our objective at ABC to provide the highest possible standard of service to customers so I believe that our performance needs to be impartially assessed regularly. In order to do this we are conducting a survey to enable customers to help identify those areas where we fully meet your needs and those where you may like to see improvements.

To be accurate and impartial this process needs to be carried out in a professional and objective manner. We have therefore appointed TLF Research, a research consultancy which specialises in this work, to carry out a survey on our behalf. TLF Research will do their best to contact you in between xxx and xxx to arrange a telephone interview lasting around 10 minutes. (Or you will be contacted by email, receive a questionnaire through the post, as appropriate.) We really would appreciate a little of your time to help us by giving feedback on our products and services. TLF Research will treat your responses in confidence. However, if there are any particular points that you would like to draw to our attention, you can ask for them to be noted and your name associated with them if you wish.

After the survey, the results will be analysed to highlight areas where we need to improve our performance and we will implement any necessary changes to enable us to provide a first class service to our customers. We regard this as a very important step in our aim of continually improving the level of service we provide to all our customers and would like to thank you in advance for your help.

Yours sincerely

Emmett Brown  
Chief Executive Officer

## How to warm up customers?

There are a number of ways to get the message to customers. Employ a range of approaches to get the best reach across your customer base:

- **Letters/email** – send out a letter/email explaining to customers why, when and how the survey is going to take place
- **Social media** – a tweet, Facebook post or message on a blog can assure customers that if they are contacted there is nothing to worry about
- **Newsletters** – an article or simply a line or two, in a prominent position, can provide relevant information
- **Website** – a paragraph on the home page or relevant pages as a reminder a survey is taking place. Including a link to the agency conducting the research adds further credibility
- **Staff** – contact centre staff can make customers aware when they call; account managers can personally inform customers
- **Posters** – where customers visit counters, branches or offices, posters can be displayed
- **Regular mail** (such as invoices, receipts, acknowledgements) – include a ‘footnote’ to inform customers
- **Email signatures** – adding a short message to an email signature can be a cheap and effective way of building awareness
- **Events** – meetings or conferences can include a spot of information sharing

### Key points:

- Use a combination of communication methods for a wide reach
- Deliver the communication close enough to the field work taking place for customers to recall being warmed up but in good time for them to take the message in, usually 7–14 days ahead of the field work starting. Communication can continue whilst the survey is live in the form of a reminder (along the lines of ‘Thank you if you have taken part – but if not, we would still appreciate your feedback’)
- Warm up every customer on the contact database. There is little sense in warming up some customers and not others. You may vary the approach or message slightly to suit customer types

## Maximising response rates

As well as an effective warm-up campaign, the following factors will further impact response rates:

- The quality of the data – poor quality contact data (i.e. data that is incorrect or incomplete) cannot generate response. This means if names and address details are inaccurate or telephone numbers are wrong there may be little or no response. This includes recognising any time zone differences if customers are overseas. At best, response will be hard to come by. At worst, the exercise will be an embarrassing or expensive waste of time. The quality of your data may quickly become apparent as you plan your warm up campaign.
- The ‘appropriateness’ of contacts – if the ‘wrong’ person, or an unsuitable person, is contacted they are unlikely to take part. If they do take part, their response will not be useful. This particularly applies to B2B surveys where the job role of the respondent may be vital to gathering relevant feedback.
- The purpose of the survey – if the reason for conducting the survey is of little interest or relevance to the customer they will be unlikely to take part.
- The ‘characteristics’ of the contacts – some customers are more difficult to get hold of than others and this can affect response. In these cases, it makes sense to allow more time for the survey. For example, securing interviews with customers who are frequently travelling may take longer.
- Your relationship with contacts – where the relationship with customers is perceived to be weak customers will be less likely to respond. If an organisation goes for lengthy periods of time without having any contact with customers, they may find response is lacking. However, it may be important to include these customers in the survey. How will an organisation understand these customers, gather their feedback or assess their potential if it makes no attempt to talk to them?
- The time (month, day, hour) of the call or email – Bank Holidays, national events and popular sporting events can affect response. E.g. Europeans holiday during August and response can be poor during this time. It can also be difficult to capture feedback in the run up to Christmas when customers are busy.
- The length of the questionnaire – a long questionnaire may affect response. Customers may not respond or may not complete the survey. This can particularly apply to postal surveys. Where a longer survey is unavoidable, make customers aware of this upfront and explain why. Under the MRS Code of Conduct any given timescales for completion have to be accurate.
- The layout of the questionnaire – wordy questionnaires in a small font, or questions that do not flow will deter customers.
- The interviewer – interviewing is a skill that requires training. Trained interviewers can encourage customers to take part in a survey and gather unbiased feedback quickly and effectively. Poor response rates can be due to inexperienced interviewers.
- Previous history – if a customer has completed a survey previously (either for your organisation or another) and been misled or found their information has been used inappropriately they may be unlikely to take part.
- Action resulting from previous feedback – if a customer has given up time to complete the survey in the past but had no response, no feedback or seen no change, they will be less likely to take part again.
- Some response rates will always be on the ‘low’ end of the scale. Busy professionals who are time poor may be less likely to take part in a survey than customers with time on their hands. To avoid disappointment be realistic about response rates, allow adequate time for the survey process and consider the data collection method carefully.

Since organisations will often be making very important decisions on the basis of survey results it makes sense to invest some time and budget to ensure that you get the best possible response rate and quality of response. An effective warm up campaign is an often overlooked but crucial part of this plan.