Building Actionable Survey Programs

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Great Brook

Enhancing Organizational Improvement Through Customer Feedback

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About
Great Brook’s Consultancy

- Customer Feedback Process Management
  - Survey feedback programs
  - Service delivery quality assessment, management & improvement
  - Service recovery practices
- Survey Design Workshops
  - Seattle, May 10-12, 2012
  - Washington DC, June 19-21
- Publications
  - Support Services Questionnaire Library
  - Customer Surveying: A Guidebook for Service Managers
  - Problem Prevention Through Design For Supportability,
    - Major research report co-authored with Dr. Keith Goffin

All Publications Available from Great Brook www.greatbrook.com

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But What Is the Goal of the Survey Program?

Develop Improvement Plans? or Generate the “Right” Data?

(maybe for Good PR or to Get Bonuses)

What does “Actionable” Mean? Survey Data that...

✓ Measure what you intend to measure
   = Questionnaire validity
✓ Fulfill the proper research objective
✓ Are interpretable for direct action
✓ Have sufficient quantity for reasonable statistical accuracy
✓ Contain no administration biases
Questionnaire Validity:
Measures What you Intend to Measure

Could you have different interpretations of these questions?

Q4. How satisfied are you at the speed at which:

- your call was answered
- your e-mail was answered

- Very dissatisfied
- Somewhat dissatisfied
- Nothing special
- Slightly better than expected
- Very satisfied
- N/A

Questionnaire Validity:
Poorly Worded Questions

- Ambiguous wording
  - Information was communicated well before the event.

- Double barred question
  - The tech was knowledgeable and easy to understand.

- Ambiguous benchmark
  - I believe managers provide consistent statements of expected performance.
Ambiguous Wording Example

Questionnaire Validity: Impact of Question Sequencing

Will your short-term satisfaction level skew the importance you assign?

<table>
<thead>
<tr>
<th>Importance</th>
<th>Satisfaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Speed of Response</td>
<td>_____</td>
</tr>
<tr>
<td>Quality of Resolution</td>
<td>_____</td>
</tr>
<tr>
<td>Agent Professionalism</td>
<td>_____</td>
</tr>
</tbody>
</table>
Questionnaire Validity
Sequence Impact from Section Headers

Survey conducted of field office personnel in a company.

Section 3: Human Resources
1. The individuals I deal with at the Home Office are knowledgeable about the issues I need help with.
2. Information is quickly communicated to field offices.
3…

What *individuals* are you thinking about?

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Questionnaire Validity:
What would you do with this response?

A few final questions regarding your relationship with K&G Industries.

<table>
<thead>
<tr>
<th></th>
<th>Strongly Disagree</th>
<th>Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall, K&amp;G Industries is responsive to our needs.</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
<tr>
<td>K&amp;G Industries is an easy company to do business with.</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
<tr>
<td>I would recommend K&amp;G Industries to colleagues in need of XXX products.</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
<tr>
<td>Overall, I am very satisfied with K&amp;G Industries.</td>
<td>1 2 3 4 5 6</td>
<td></td>
</tr>
</tbody>
</table>

What one or two actions could K&G take to increase its value to you?

Overall, I am very pleased with the functionality of the K&G Industries’ products and their TAC support.

No survey achieves 100% validity.

But practice poke yoke (mistake proofing).
Questionnaire Validity: Leading & Loaded Language (& Admin Bias)

Did you know that car accidents are the number one cause of death amongst teenagers? In fact, teenage drivers are involved in approximately 20% of all reported car accidents every year. The National Highway Traffic Safety Administration states that immaturity and inexperience are the reason for these accidents. What’s worse is that no one is taking action to remedy the issue.

While almost every student driver attends formal driving school, the quality of driving schools is becoming laughable and attending driver’s education is often considered a necessary boredom. RoadReady will revolutionize the quality of driver’s education. But before we can begin preventing those 5,000 deaths per year, we need your input about the current quality of driver’s education. Below are surveys for students and parents to offer their opinions and change the plummeting quality of driver’s education. Please forward this to anyone you know who has participated in driver’s education or has a teenager who has done so. Thank you for your input. Your participation will help us start saving lives.

Fulfill the Proper Research Objective?

- My email to the person from whom I got the survey invitation:
  - I don’t know your affiliation with RoadReady, but I do conduct surveys for a living. And these surveys are two of the best examples of the use of loaded and leading wording I have ever seen.

- Response to my email…
  - Unfortunately, I did not get as many responses as I would have liked, but the class project is over now and the surveys served their purpose in getting the answers I needed to support our proposition.

- My response
  - With my professorial (and consultant) hat on, I have to point out that you did not find support for your proposition. The survey data you generated lack all validity and I would never make a business decision based on that data.
Fulfill the Proper Research Objective: What’s the Implicit Objective Here?

In our continuing efforts to give the highest quality of customer satisfaction, Systems, Inc. would appreciate your input as relates to the installation we have just completed. If you would take a few moments to complete the survey below it will help us give the best customer satisfaction possible.

1. Technicians were prompt to arrive
2. Technicians were friendly and respectful
3. Job Manager introduced him/herself prior to job start
4. Technician answered questions and concerns
5. Technicians worked in a professional manner
6. Job was completed in a timely manner
7. Job site was clean and left in order
8. Office personnel were professional and helpful
9. Payment terms were clear and provided enough options

HVAC Post-Installation Survey

What’s Missing?

Interpretatable Message: Abuse of Open-Ended Questions

Certification of Service Management Professionals

Certification Issues
1. What do you see as the major advantages of certification for services management professionals?
2. What do you see as the major disadvantages of certification for services management professionals?
Interpretable Message

If your experience with some service *exactly matched what you expected*, where on this continuum would you place your feelings?

More Negative  More Positive

Interpretable Message: Impact of the Scale Design

Please rate your satisfaction with each of the following:

- Very Satisfied
- Somewhat Satisfied
- Neutral
- Somewhat Dissatisfied
- Very Dissatisfied

Performance – Expectations = Satisfaction

http://www.greatbrook.com/survey_questionnaire_design_ritz_carlton.htm
Interpretable Message

Confusing wording

Ambiguous wording

Incomplete response options

Loaded language

Excerpt from the Ritz transactional survey.

Please rate your satisfaction with each of the following:

Overall satisfaction with this experience
Receiving a warm and sincere greeting upon arrival
Staff greeting you by name
Staff remembering you as a regular guest
Timeliness of check-in
Ability of the staff to anticipate your needs
Cleanliness of the guest room furnishings
Receiving a fond farewell when you checked out

Did you experience any problems during your stay?
Yes ☐ No ☐

If you reported any problems, how satisfied are you with the resolution?

Comments:

Getting Statistically Valid Samples

CSG, p. 146

Population NOT sample.
Achieving Statistically Valid Samples

- Reduce *respondent burden* to increase response rate
  - Engage the respondent; build rapport
  - Don’t overuse open-ended questions!
  - White space: get rid of extraneous verbiage
    Focus respondent on *construct of interest*
  - Good, clean layout
  - Use generic scale applicable to many questions
  - Branch beyond blocks of not-applicable questions
  - Short & to the point: *The 10-minute Rule*
  - Don’t over survey: Survey a sample, not a census

Achieving Statistically Valid Samples

- Critical to “marketing” the survey program

**Take Action! Report the Actions !!!**
Achieving Statistically Valid Samples: Incentives Two-edged Sword

Motivate the middle-of-the-road people

Incent people to click on anything to get the gift

Achieving Valid Sample Size: What if “survey” becomes a spam word?

Challenge: Get customers’ corporate mail servers to white-list your company.
Contain No Sample Bias

Random selection from a **biased subset** of the population is NOT a random sample!

The CBS/NY Times survey had a sample bias.

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How to Create an Administration Bias

Yahoo Merchant Survey

I made no rating for “Customer Service”
How to Create an Administration Bias

Here’s the screen I got. When I clicked “Try Again,” I got...

They insulted the customer! And wasted my time!

Would I take another Yahoo survey?
Data Devoid of Administration Biases

Statistical significant response set
+ Administration bias
----------------------------------------
= (Probability of) Misleading Garbage

- Control for “Interviewer bias” – if phone survey
- Non-response bias
  - Those without extreme views don’t bother to respond
- Random selection invitation process
- Active solicitation process – *NOT* passive

Think *Outside* the Survey Box

**Generalizability of Results**
- • Active Surveys
- • Call Monitoring

**Depth of Context**
- • Passive Surveys
- • Interviews
- • Focus Groups
- • Unsolicited Comments
- • User Groups
- • Mystery Shopping
- • Social Media

Think in terms of an *Actionable Research Program*