


Building Actionable Survey Programs

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Enhancing Organizational Improvement Through Customer Feedback

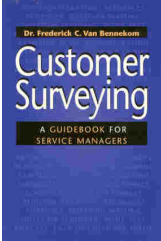
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About Great Brook's Consultancy

- ❑ **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?

Data to...

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

(maybe for Good PR or to Get Bonuses)



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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



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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:

	Very dissatisfied	Somewhat dissatisfied	Nothing special	Slightly better than expected	Very satisfied	N/A
your call was answered	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
your e-mail was answered	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



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Questionnaire Validity: Poorly Worded Questions

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

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

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



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Ambiguous Wording Example

Session Evaluation Form

Session #: 802 Speaker: Frederick Van Bennekem

Please circle the response you feel is appropriate for each statement.

	Excellent				Poor
Overall Session Rating	(5)	4	3	2	1
	Strongly Agree				Strongly Disagree

The session content was what I thought it would be.	(5)	4	3	2	(1)
The session provided useful information.	(5)	4	3	2	1
This would be an important topic to include next year.	(5)	4	3	2	1
The handouts contained relevant information.	(5)	4	3	2	1
The speaker had a strong knowledge of the subject.	(5)	4	3	2	1
The speaker had strong presentation skills.	(5)	4	3	2	1
The speaker did not promote his/her company, product, service.	(5)	4	3	2	1
I can apply immediately what I learned to my current job.	(5)	4	3	2	1
The speaker has a strong ability to communicate ideas.	(5)	4	3	2	1
The speaker handled audience interactions and Q&A effectively.	(5)	4	3	2	1
I recommend this speaker for other events.	(5)	4	3	2	1

Additional comments/information: *I would like to see this subject handled with a whole "stream" - with beginning & advanced sessions on the topic*

Thank you for participating in this program and providing us with your valuable feedback.



Questionnaire Validity: Impact of Question Sequencing

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

	<u>Importance</u>	<u>Satisfaction</u>
Speed of Response	_____	_____
Quality of Resolution	_____	_____
Agent Professionalism	_____	_____



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.

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

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).



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Questionnaire Validity: Leading & Loaded Language (& Admin Bias)

Yellow highlights are mine

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.



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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.**



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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.

- | | Excellent | Good | Fair | Poor |
|--|-----------|------|------|------|
| 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?**



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## Interpretable 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?

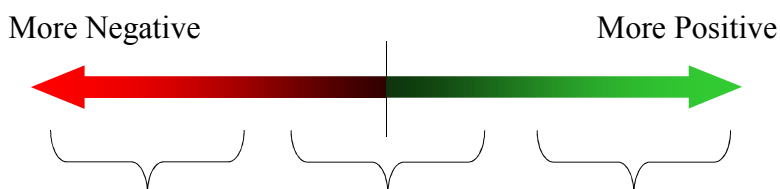


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## Interpretable Message

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



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## 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

**Where's Satisfied?**

Performance – Expectations = Satisfaction



[http://www.greatbrook.com/survey\\_questionnaire\\_design\\_ritz\\_carlton.htm](http://www.greatbrook.com/survey_questionnaire_design_ritz_carlton.htm)

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Slide 16



## Interpretable Message

Confusing wording

Ambiguous wording

Incomplete response options

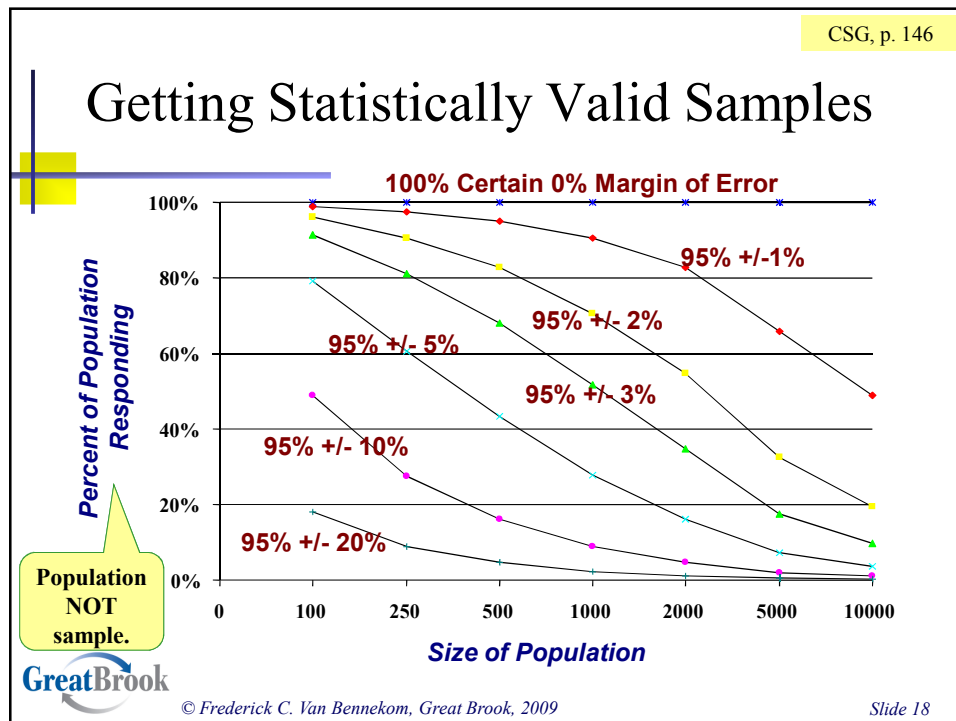
Loaded language

**Excerpt from the Ritz transactional survey.**

Please rate your satisfaction with each of the following:

|                                                                                                               | Very Satisfied           | Somewhat Satisfied       | Neutral                  | Somewhat Dissatisfied    | Very Dissatisfied        |
|---------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Overall satisfaction with this experience                                                                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Receiving a warm and sincere greeting upon arrival                                                            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Staff greeting you by name                                                                                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Staff remembering you as a regular guest                                                                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Timeliness of check-in                                                                                        | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Ability of the staff to anticipate your needs                                                                 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Cleanliness of the guest room furnishings                                                                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Receiving a fond farewell when you checked out                                                                | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Did you experience any problems during your stay?<br>Yes <input type="checkbox"/> No <input type="checkbox"/> |                          |                          |                          |                          |                          |
| If you reported any problems, how satisfied are you with the resolution                                       |                          |                          |                          |                          |                          |
|                                                                                                               | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Comments:                                                                                                     |                          |                          |                          |                          |                          |

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## Achieving Statistically Valid Samples

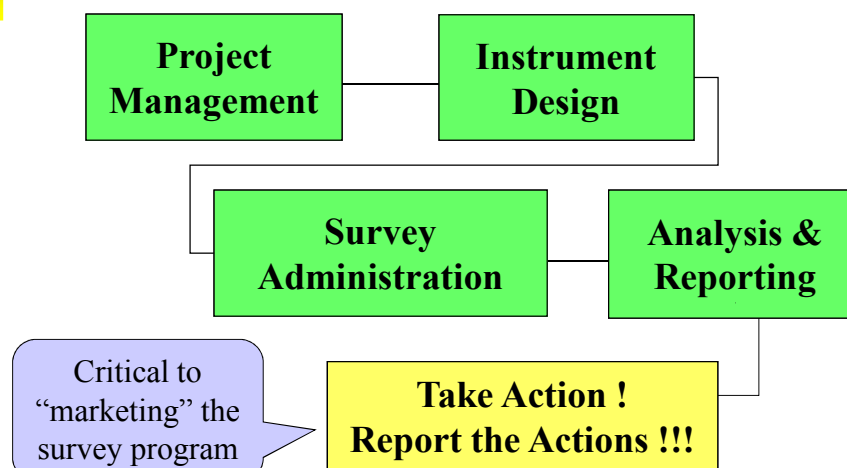
- ❑ Reduce **respondent burden** to increase response rate
  - ✓ Engage the respondent; build rapport
  - ✓ Don't overuse open-ended questions!
  - ✓ White space: get rid of extraneous verbiage  
Focus respondent on *construct of interest*
  - ✓ Good, clean layout
  - ✓ Use generic scale applicable to 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



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## Achieving Statistically Valid Samples



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## 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



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

From: JPMorgan Chase & Co. <dfs342r@chaseutley.com>  
Subject: **Online Survey - Add 50\$ to your account in 2 minutes!**  
Date: November 10, 2008 12:13:25 PM EST  
To: information@greatbrook.com

Challenge: Get customers’  
corporate mail servers to  
white-list your company.

Dear Customer,

You are invited to take part in our nation-wide 5 question survey. Your time is very important to us so \$50 will be credited to your account upon the completion of this survey.

Please note that no sensitive information will be required, collected or stored. The information will be used to further improve our services

To take part please [click here](#)

© 2008 JPMorgan Chase & Co.



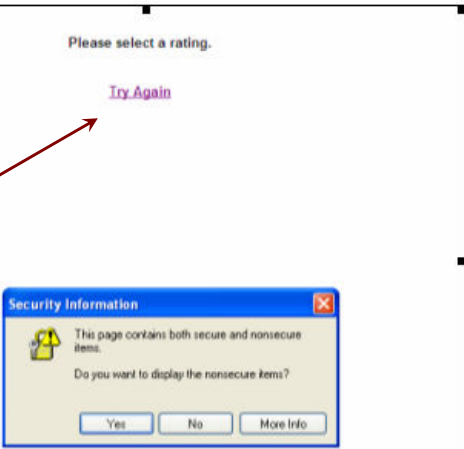
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## How to Create an Administration Bias

Here's the screen I got.  
When I clicked "Try Again," I got...



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## How to Create an Administration Bias

They insulted the customer!  
And wasted my time!

Would I take another Yahoo survey?

\*denotes required field

From: A boomersintheknow.com customer

Rate this merchant:

|                   |         |                         |                         |                         |                         |                         |              |
|-------------------|---------|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|--------------|
| Overall:          | << Poor | <input type="radio"/> 1 | <input type="radio"/> 2 | <input type="radio"/> 3 | <input type="radio"/> 4 | <input type="radio"/> 5 | Excellent >> |
| Price:            | << Poor | <input type="radio"/> 1 | <input type="radio"/> 2 | <input type="radio"/> 3 | <input type="radio"/> 4 | <input type="radio"/> 5 | Excellent >> |
| Shipping Options: | << Poor | <input type="radio"/> 1 | <input type="radio"/> 2 | <input type="radio"/> 3 | <input type="radio"/> 4 | <input type="radio"/> 5 | Excellent >> |
| Delivery:         | << Poor | <input type="radio"/> 1 | <input type="radio"/> 2 | <input type="radio"/> 3 | <input type="radio"/> 4 | <input type="radio"/> 5 | Excellent >> |
| Ease of Purchase: | << Poor | <input type="radio"/> 1 | <input type="radio"/> 2 | <input type="radio"/> 3 | <input type="radio"/> 4 | <input type="radio"/> 5 | Excellent >> |
| Customer Service: | << Poor | <input type="radio"/> 1 | <input type="radio"/> 2 | <input type="radio"/> 3 | <input type="radio"/> 4 | <input type="radio"/> 5 | Excellent >> |

Write your review: (optional)

- Don't post personal information about yourself (full name, address, etc)

Do not send comments to boomersintheknow.com  
 Send my comments and contact information to boomersintheknow.com



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Slide 26

## Data Devoid of Administration Biases

$$\begin{aligned} &\text{Statistical significant response set} \\ &+ \text{Administration bias} \\ \hline &= \text{(Probability of) Misleading Garbage} \end{aligned}$$

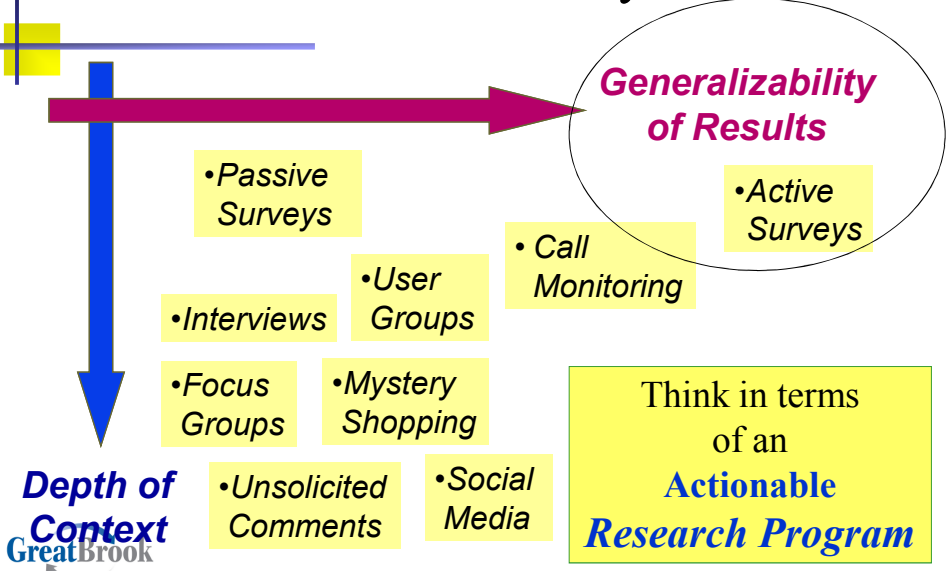
- ❑ Control for “Interviewer bias” – if phone survey
- ❑ Non-response bias
  - **Those without extreme views don’t bother to respond**
- ❑ Random selection invitation process
- ❑ Active solicitation process – *NOT* passive



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## Think *Outside* the Survey Box



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