

THE SURVEY AS CONVERSATION:

Being Curious About Your Customers Is About to Get Easier

A GUIDE

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Introduction

I once went to dinner at a very nice restaurant that had an excellent reputation. My dinner companion began with a Caesar Salad, but he ate very little of it since it was drenched with salad dressing.

When the server came to clear the plates, he asked if everything was all right. “No,” my companion said, “There was too much dressing on the salad.”

“Oh,” the server said, and took away the plates.

We looked at each other. “Just ‘Oh?’ No ‘I’m sorry?’ No ‘May I get you something else?’ *Why did he ask if he wasn’t going to do anything about it?*” My companion swore at that moment never to return.



Have you ever gone to a restaurant, read the menu, placed your order, and gotten something different than what you ordered? How did you feel?

Have you ever gone to a restaurant expecting to be given a menu, and been served a meal you didn’t even get to choose? Most restaurants thrive on asking their customers what they want, and then do their best to give it to them. What is a server’s job, if it is not to survey what the customer wants? And when they ask if everything is all right, the best restaurants and their staff listen to and address your concerns.

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The fact that you are reading this means that you are likely either looking to develop and/or launch a product or service, or you want to gauge your customers' satisfaction with products and services you already provide.

But there is also a good chance that you're thinking, "But how do I know what they want? What do I ask? And how do I do it?"

It's OK. All you really need is open curiosity about your customers, the willingness to have a conversation with them, and the desire to make them happy. And being curious about your customers is about to get easier.

This guide will help you think about the key considerations in developing, delivering, and doing something about a survey for your customers, and there is a worksheet at the end to help you lay the groundwork.

We have a dual goal of making your customers happy without stressing you out. Both are possible!

Are you curious? Let's get started.

The W's of Surveying

You've probably heard of The W's. We are going to look at the W's of surveying your customers: Who, What When, Where, and Why. (And How.) Although not in that order.

W *hy*

Surveys and Polls can be as short and focused as one laser-like question or as broad as a 10, 20 or 50 question survey. Length (or brevity) by itself is not a guarantee of focus and effectiveness. But having a clear purpose **is**.

The *Why* is your reason for reaching out to your customers (or future customers).¹ What is your Purpose? You may have an idea you want to validate ("If I build it, will they come?") or you may be looking for inspiration ("I don't know where to start!") or you may want to find out if they're happy with you're already doing.

So, two common reasons for surveying your customers are:

- To obtain guidance, and
- To get feedback.

¹ For our purposes, when we say "customers" we mean both your Prospects and Customers who are using your products, whether they were free or paid for. And when we talk about "products" here, we mean both products and services.

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How did you find out about this offer? (Choose one)

I saw a retweet

Someone forwarded it to me

I'm on your list

Mentioned on another website (please specify)

A third reason might be to find out how your customers found you so that you can focus on developing that resource as a marketing method.

W hat

There are two important *Whats* to be considered. The first is: *What do you want to know?* This goes back to your Purpose. The second is, *What do you intend to do with the information you get back?* This also goes back to your Purpose. (See *What to Do with the Responses*, below.)

What do you want to know?

This is the heart of your survey: The questions. If you were sitting down with your customers, what would you ask them? Remember – at its heart, a good survey is a conversation. So fill in this blank: “If I knew __, I would be able to __.” Then you can begin writing your questions.

What and How are related.

Once you are clear on *What* you want to know, there are some *Hows* to consider as you develop your survey.

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How are good questions built?

There are a few important rules of thumb when building survey questions:

- Every question should help you achieve your goal.
- If your questions are clear, your responses will be easy to interpret.
- Avoid compound questions, such as “How would you rate our products and Customer Service?” (Weak – they may love one and hate the other.)
 - Splitting the question provides much stronger, actionable data:
 - How would you rate our products?
 - How would you rate our Customer Service?
 - Even better would be asking for ratings on specific aspects of each:
 - Please rate Magnificent Product #14’s
 - Durability
 - Beauty
 - Ease of use
- Avoid rating scales that are positively or negatively weighted (Fair, Good, Excellent). Instead, always provide a scale that is evenly weighted with negative and positive options so that you provide an opportunity for honest feedback.
- Language is important – If a word (such as “fair”) can be interpreted differently by different people, find a word that is less subject to interpretation.
- When asking people to choose between options in a list, think carefully about whether they are mutually exclusive. If not, allow them to “Check all that apply.”
- Open text responses can be very useful in obtaining information not anticipated in list response options, but bear in mind they can be more difficult to analyze.



Please rate your experience:

- Extremely Disappointing
- Somewhat Disappointing
- Neutral
- Pretty Good
- Fantastic!

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How long should the survey be? That depends on What you want to know.

The survey should be exactly as long as it needs to be. And that depends on your purpose for creating the survey.

Some experts will insist that a survey should be no more than X number of questions, but I disagree. Here are some important things for you to consider:

- Every question should help you achieve your goal. Ask yourself: Do I really need to know this? Is it a Nice to Know or a Need to Know?
- Time is money – don't waste your respondents' time on questions that don't help them or you.
- It is very important to set expectations about the survey's length before people begin.
- The longer your survey, the more important it is to show a progress bar or page number so respondents don't give up in despair just before the end.
- The longer the survey, the more useful it is to give respondents a chance to save a partial response and complete it at a later time.

A magazine I subscribed to asked me to take an online survey. I started, and it went on, and on, and on... They asked me all kinds of questions, without ever giving any indication of how close I was to finishing. When I finally finished, I had spent a half an hour on their survey. I got additional requests from them to take more surveys in the future, but I never took them. What a waste of time!

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W *ho*

This is where you define your target audience, and this will be shaped by your purpose.

For example, if you are looking for feedback on current products and services, even if they're free, then your target audience will consist of past and current customers (excluding prospects).

If you are looking for guidance in developing future products, then you might ask past and current customers **and** a host of other people who will hopefully be interested in – and be willing to pay for – your products.

You may already have a list of people to survey for guidance, but this is a great time to brainstorm with others on additional places to find people. For example, I have a friend who has cool niche and a decent sized list of people to survey. She has recently gotten some attention from other blog-watchers in her niche who have directed people to her site, but it was only through brainstorming that it occurred to her to ask them to invite their readers to participate in her survey.

W *here and How*

Where and *How* are related.

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Where Do You Encounter Your Customers?

Think about *Where* you typically encounter your intended targets. Via your newsletter? Your blog? Elsewhere on your website? Via social media (Twitter, Facebook, LinkedIn, etc.)? Maybe you've never encountered them, like the other people in your niche who visit related sites.

How Should You Contact Them?

Good news! It is possible to deliver surveys to them wherever they are – via email, via a box or a pop-up on your website, or via a link delivered to your contacts through your updates to Twitter, Facebook, LinkedIn, etc. Survey tools offer a variety of methods (*How*) for getting your survey in front of people.

Here are some options for you to consider:

- If people have signed up for your list, you can send them an email with a survey link that is unique to each recipient through a survey provider such as SurveyMonkey or PollDaddy (or a host of others), or you can send a generic survey link through your email service provider (MailChimp, GraphicMail, AWeber, etc.).
- If you mainly interact with your targets via your website, you can place a generic link in a prominent location on your website, such as a sidebar widget, or you can invite them via a blog post.
- You can also create a pop-up survey that is triggered by an event such as visiting your site or going to a particular page.

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- You can proactively invite your LinkedIn, Facebook, and Twitter followers to participate, if appropriate, and provide them with a generic link in your Update.
- If you have collected business cards and/or built a list into which people have *not* opted-in, you should invite them individually through your own email address. (See Anti-Spam Guidance, below.)

When

There are two *Whens* to consider:

When should I send the survey?

This depends on the purpose of the survey. (That Purpose is more and more important, isn't it? If it doesn't answer all of these questions then it needs more work.) Here are some things to consider:

- If the purpose is to help with product development, don't wait until just before you're ready to launch. Give yourself time to incorporate responses into the product's design and/or your marketing materials. (To ask for input and then disregard it will not make your customers happy. It is better not to ask at all. Remember that waiter?)
- If the purpose is to collect data on satisfaction with your products, then there are additional considerations:



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- Do you want to do a one-time survey of your customers to-date? (Responses can also be applied to product development.) In this case you can do it any time, depending on your purpose.
 - Did they like it?
 - Did it meet their needs?
 - Are they still using it?
- Do you want to do an ongoing survey triggered by events (purchase, completion of a consultation, completion of a customer service interaction)? In that case the survey should be presented soon after the event (so that the experience is still fresh) but not so soon that the experience has not fully happened (purchase completed but product not delivered).

When should I close the survey? (How long should the survey be open?)

In most cases it is a good idea to set a date by which the survey will close, especially if you have a specific goal for acting on the results, such as creating a product. The time window for accepting responses is up to you, but two weeks is a useful rule of thumb in most cases.

Also, if the survey is triggered by an event, such as the purchase of a product or an interaction of some kind, it is best to obtain the feedback while that interaction is still fresh in the customer's mind. If you give them too much time to respond, the event will fade in their memory – and they may forget to complete the survey!



Important Considerations

The Invitation

Your invitation is crucial in getting people to complete your survey. A strong invitation:

- Clearly states the purpose (Why)
- Explains why you want *their* opinion (Who)
- Tells them if there is an incentive (What)
- Tells them how long the survey is (What)
- Tells them how long they have to complete it (When)
- Is brief

Spending some time on crafting a strong invitation will have a positive impact on how you are perceived and can increase the number of responses you get.

Anti-Spam Guidance



It is very important that you respect people's sensitivity to being bombarded with unrequested email. Also, Email Service Providers (and consultants like myself) are very protective of their reputations, as the deliverability of their messages depends upon not developing a reputation for evil Spam. You will be asked to pledge that you are only asking them to send emails to people who have opted-in.

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If you have done business with someone, there is a relationship in place. This relationship creates implied permission to email them, but that implied permission should not be abused.

As mentioned above, if you have collected email addresses but people have not “opted-in” to your email list, you should carefully contact them individually through your own email address and invite them to take your survey and sign up for your list. Yes, this can be time consuming. But there is an **additional benefit** of building personal relationships that will enhance your business.

Should you send a reminder?

It depends upon the method of delivery.

Most people’s inboxes fill up pretty quickly, and their Twitter streams and Facebook updates tend to move quickly as well. So there is a good chance that if they don’t take your survey at the moment they first see the link, it will get buried and they will forget. This happens even if they intend to take it later.

A reminder to complete the survey a few days before it closes is a very good idea. The reminder can be delivered using the same method as the original invitation (unless the survey is a pop-up survey attached to your website).

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Should the survey be Anonymous?

It depends on several things:

- How personal is the nature of the questions and answers? If very personal, respondents may feel more comfortable – and therefore more likely to participate – if they know that their responses are anonymous.
- Do you know the identity of the person to begin with? If not (such as people visiting your site or people invited through colleagues), and you want to know who they are, you will have to ask them to provide their identities.
 - You will need to decide whether to require this information or make it voluntary.
 - It may be helpful to explain what you will do with it (follow-up on issues, provide results, etc.). They may be concerned about getting spammed afterward so you may need to address that.
- If you don't intend to follow-up personally, don't ask for their identities.
- If you do not intend to follow-up but need demographic information (age, gender, line of business, location, etc.), you may ask for it. But only ask for it if it will be useful to your analysis and planning.

May we contact you to follow-up?

Yes

No

What is your gender?

Male

Female

Note: Many survey tools can prevent someone from completing a survey more than once based on their IP address even if their response is anonymous.

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Incentives

There is a variety of opinions about the usefulness and appropriateness of offering incentives for completing surveys. Here are a few things to consider:

What type of incentive is appropriate?

- This depends upon the nature of your business, the length of the survey, and the nature of your relationship with them (see below).
- Options include small cash incentives, gift cards, coupons for discounted or free products/services, or “free” information products. Even an emotional incentive can be effective, such as emphasizing that they are contributing to the success of an important Cause.
- The type of incentive is also dependent on whether the survey responses are anonymous.
 - If the incentive is something that can be downloaded, you can include a link to download the item in the Thank You page that comes up when the survey is completed. This can be done regardless of anonymity.
 - If the incentive is something that must be delivered, such as a gift card, then you will probably need for the respondent to not be anonymous.

*Thank you for completing
this survey!*

Please [click here](#) to
download my E-Book!

Do you have a relationship with your targeted respondents?

- If they are already customers, even if they are only readers of your blog or have downloaded free products, then there is a good chance that they already have an incentive: Future products or improved service.
 - An incentive beyond that may not be necessary.
 - An incentive may, however, help to strengthen the relationship or create demand for future products. Examples might include “free” e-books or whitepapers that provide a taste of what you can provide. (Of course they’re not really free, they paid for them by taking your survey!)
- If there is not a strong relationship, then an incentive may be useful.
 - A typical example is a market research survey that offers a \$1 bill or a gift card to those who complete surveys. *This is where there are differences of opinion: Is a survey response that is submitted only to get an incentive valid? Some people say yes, others say no.*
 - An incentive of a “free” e-book or whitepaper can give you exposure and expand your following.
 - It costs you nothing (or next to nothing)
 - It appeals to people who are interested in you and your products, and screens out people who just want a coffee card or are collecting gift cards.

How long is the survey?

- The longer the survey, the more your respondents will appreciate a tangible Thank You.

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What to Do with the Responses?

If you go into polling your customers with an open mind, you can get some delightful **inspiration and insight** into ways you can delight them.

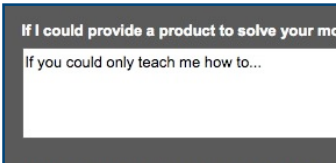
Surveying is also a great way to **test your assumptions**. It also can provide you with surprises (both positive and negative) and with inspiration for things to tweak or add to your products and services.

Your assumptions may be validated – Yay! You’re on the right track! You may now finish creating that product or collect testimonials and live happily ever after!

What if you find out your assumptions are wrong?

Don’t worry – this happens to everyone. You have several options:

- You can recognize that this group of people has a *different* need that you can meet, and you can change direction. Note: You may find this exciting, or you may feel relieved, or you may be disoriented. You may even need to grieve. Those are all OK.
- You can do more research and see if there is a different group out there that wants what you’ve got.
- You can disregard the data and build what you want to build. This thing you’re building may be so grand and glorious that the people who responded just may not fully appreciate it. Or it may be blocking your ability to work on anything else until you can get it out of your head. Go for it, *but recognize that you’re doing it for yourself and not for anyone else.*



What if you are asking about their satisfaction?

You may get validation that you're on the right track; you may get great material for testimonials; or you may get a nasty surprise about something that needs to be fixed. This is a crucial moment, because you must act to address the concern.

If you ask, and your customer cares enough to tell you, you must respond appropriately or risk losing that customer forever.

Please rate your experience:

- Extremely Disappointing
- Somewhat Disappointing
- Neutral
- Pretty Good
- Fantastic!

What follow-up will you provide?

Effective follow-up doesn't only apply to solving problems that have been brought to light. It also includes saying Thank You for positive feedback and acknowledging suggestions.

Have you ever had someone ask you a question and then obviously not listen to your response? (Such as ordering something at a restaurant and getting something else?)

Or, have you ever had someone ask your advice and then never tell you what he or she decided or, worse, blatantly disregard it?

How did you feel?

If you have any desire to establish or strengthen a relationship with your respondents, then following up with them is a good idea. Why? **A survey is nothing more than a**

conversation. Good conversations are two-sided, and real curiosity helps keep the conversation going.

Follow-up can take several forms:

- Immediate follow-up through use of a survey tool that allows respondents to see how their responses compare to those of other respondents.
- Announcement of steps taken as a result of the survey, such as development of new products or changes to policies and procedures. These announcements can be made via the same method that you delivered the survey. *People love knowing that they've helped.*
- Individual follow-up (where the responses are not anonymous), especially if a problem was revealed or exceptional praise was received.

May we contact you to follow-up?

Yes

No

Be careful what you ask for

A woman called the headquarters of a large company with a complaint. "I filled out the survey you sent me," she said, "and told you about a terrible experience I had with one of your branches. *And no one ever followed up with me. Why did you ask if you didn't want to know?*"

A man called a company he had been doing business with for years and said, "I completed your survey and told you about something that happened, and *someone called and yelled at me for making them look bad.*"

Imagine if the waiter – or the chef – had berated my companion for having the nerve to not appreciate that salad and making them look bad in front of the other customers.

These were important learning opportunities, and one of the many lessons was, **“If you don’t want to know, don’t ask.”** It is much harder to recover from debacles like these than to skate along pretending everything is fine.

But skating along doesn’t tend to result in loyal customers who will buy more and refer others to you. And **customers whose problems have been fixed will buy even more and refer more people to you.**

Fixing Problems

I once coached a manager who needed to coach an employee on a situation that had been brought to light by a customer.

“A complaint is a gift,” the manager said, and I wanted to reach through the phone and kiss her.

A complaint IS a gift, and it gives you an opportunity to not only rescue but also strengthen your relationship with your customer. On more than one occasion I have had to deal with difficult situations and the customer ended up being **more loyal than if nothing bad had happened.**

There are two main modes for fixing problems.

The first is what's known as "Corrective Action." Fix the problem for the customer and rescue the relationship.

The second is "Preventive Action," a longer process in which you look at the system that created the problem, identify the root cause of the problem and fix it so it doesn't continue happening.

Bandages and disinfectant are important. They stop the bleeding, prevent infection, and facilitate healing. But without fixing the carpet that is sticking up and causing people to trip and skin their knees, you will end up wasting a lot of time and money on future bandages.

Many people live their lives in fire-fighting mode and never slow down long enough to fix the problem at its source. You can choose which path to take. Root cause analysis and preventive action require an investment of time, curiosity, and willingness to change. That investment can reap big rewards, such as additional business and referrals to new customers - if you are willing.

How likely are you to recommend this product to others?

Extremely likely

Likelihood to recommend:

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That's It!

Everything about your survey, from the invitation to the questions to the follow-up, can have an effect on your relationship with the respondent, including his or her willingness to complete future surveys, buy future products and services, and spread the word about you.

Even a short survey can have surprising results. Some of those surprises will be pleasant, and some may be unpleasant. If you are prepared to deal with both, you can significantly improve your relationships with your customers – and build more of them! And remember, listening effectively to your customers and solving problems they bring to your attention can mean fewer problems to solve in the future.

An effective survey, even if it is very short, can remove the mystery from what steps you should take next, and it can help you develop solid, lasting relationships based on a two-way communication channel.

Remember, a survey is nothing more than a conversation. Good conversations are two-sided, and real curiosity helps keep the conversation going.

Are you curious? Let's go!

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End Note

You get to choose how to move forward, and there are resources available to help. You can utilize and expand your support system to help you, whether it is with survey design and delivery, product creation, or role-playing handling difficult situations that are revealed.

There are a number of additional technical considerations when creating your survey, including ideal rating scales, question formats, length, branching, piping, randomization, statistical significance, and so on. Not to mention evaluating what tools to use and figuring out how to use them. Even a three-question survey can make your eyes roll back in your head when you're already up-to-your-eyeballs busy!

Luckily, I am here to help you with all of this. If you have enough on your plate already and would like your survey prepared by an experienced professional, please [contact me](#) today to schedule an appointment. We'll find a time that is convenient for you to meet and discuss how I can make it even easier for you to satisfy your curiosity about your customers!



Susan T. Blake helps people to cultivate creativity and connections in their businesses and personal lives, resulting in stronger relationships and processes. Her experience includes seven years managing the customer satisfaction survey program for a Fortune 1000 company. She blogs at <http://susanTblake.com>, where she finds wonder in everything from her cats to birds to skydiving and chess.

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Survey Creation Worksheet

WHY

The purpose of this survey is: _____

WHO

Define your target audience: Whom should you ask? Existing clients, potential clients (prospects) or both?

WHERE AND HOW

Where are you most likely to encounter your target respondents? (Check all that apply)

Email

- Opt-in list
- Individuals you know

Social Media

- Facebook (Friends & Likes)
- Twitter followers
- LinkedIn connections

Websites

- Your website
- Fellow members of associations
- Visitors of other sites in your niche (or related niches)

Other _____

How should your survey be delivered? (Remember, this depends on where you encounter your targets)

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WHAT

What do you want to find out? List your topics:

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

WHEN

When do you want to send the survey? _____

When do you want to close the survey? _____

Do you want to send a reminder? If so, when? _____

AND...

Should the survey be anonymous? Yes No

Do you need to collect demographic data? Yes No

If Yes, list (Age, gender, etc.) _____

Do you want to provide an incentive? If so, what will you provide? _____

What follow-up will you provide? _____