

# Why the annual 'do you love us survey' doesn't work

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### About David Jackson

David Jackson, is a founder and Managing Director of Clicktools Limited, a leader in the field of customer experience feedback software. He is widely recognised as an expert in the area of customer focused organisations and a driving force behind the Excellence in Customer Experience programme. Much of his time is spent with clients, working with senior managers to design and implement effective feedback measurement and management strategies and build organisations that can continually adapt to meet changing customer needs.

David is a popular speaker around the world. He has had many articles published, and is an author and contributor to several books, including "Dynamic Organisations: The Challenge of Change" and Becoming Dynamic".

### About Clicktools

We are the leading European provider of products and services for measuring and improving customer experience.

Founded in 2000, the company is a technology based solutions provider. We provide a range of products and services that help companies improve their customer focus.

- Clicktools – web based software that enables an organisation to measure and improve their customer experience.
- Multi channel feedback – collect feedback across all the channels your customers use, including web, email, phone, post, mobile phone, digital TV, IVR, kiosks and handheld devices.
- Feedback deployment and management services – management of all your feedback activity.
- Support services – training, bespoke survey & dashboard development and systems integration.
- Business consultancy – support for management teams seeking to improve their customer experience from Clicktools and our specialist consultancy partners.

We serve leading companies, large and small, seeking to measure and improve their customer experience. Our clients include Amcor, Cheshire Building Society, Economist Intelligence Unit, Direct Line, National Gallery, O2, the One Account, Rackspace Managed Hosting, Royal Bank of Scotland, Unisys, Yamaha, Yorkshire Building Society.



## Do your customer surveys measure up?

### Try the following test.

- We only ask customers to comment on what they have experienced first hand. Because we need reliable data, not guesses.
- We collect their views shortly after they have interacted with us, whilst the event or activity is fresh in their minds. Because people forget and we need to address service issues promptly.
- The teams who do the work receive data about their performance. Because they are the people who need to understand and improve the way service is delivered to customers.
- We report customer data alongside financial data. Because we know that customer loyalty aids improved financial performance.

If you answered yes to all of the above, you are a very rare breed. Our experience suggests that the majority of companies use a crude approach to gathering vital customer data. Periodic, often annual, surveys that are disconnected in time from the events they are purporting to measure are the norm. It is what we call the 'annual do you love us survey' and it has many pitfalls.

### *The 'annual do you love us survey' has many pitfalls.*

One of the biggest mistakes is people think that measuring customer satisfaction is the goal. Whilst this is nice to know, what companies need to know is how well they perform in those activities that customers think are important? Customers don't want to be satisfied, they want companies to perform well on things that matter.

Because companies collect feedback infrequently, they collect all the information they can. Customers receive lengthy surveys, much of which is irrelevant to them; much of which they have no direct experience of. Many end up in the bin. Those that do complete the survey get question fatigue and make guesses about the questions where they lack first hand experience. The resulting data are of questionable reliability.

Periodic surveys limit the opportunities for data driven improvement. An annual survey means only one data driven learning and improvement opportunity each year. In a competitive market, can you wait a year for an opportunity to improve? Even a monthly survey schedule means that data can be out of date, particularly when the capture and processing of that data adds weeks to the cycle. If a customer

is dissatisfied (and remember most don't complain – to you) how long can you afford for them to be walking around with a grouse? Quickly, identifying and addressing unspoken complaints is an effective way of improving loyalty but speed is of the essence.

For many, action planning is also limited by access to the data. Paper based reports and charts bound in documents as thick as telephone directories make widespread circulation difficult. Even if the information is supplied on spreadsheets, finding the right data set poses problems. There is rarely an easy way to find the right information or navigate around hierarchical views of the data.

Many companies say they want to be customer focused. A few companies (such as Avis Europe, First Direct, GE and Rackspace Managed Hosting) have embedded a customer driven approach to continuous improvement into their cultures. For them, regular collection of customer feedback at key points of interaction with the customer is the fuel that drives continuous improvement. At Rackspace EMEA, results of customer surveys are immediately available to account managers through their CRM system who are required to follow up on any negative comments within 24hours. Role specific data is provided to process teams to help drive continuous improvement. Senior managers receive regular customer feedback that is reviewed to identify systemic issues affecting the customer experience. Across the company, teams are constantly working on improving the experience they deliver.

For those still relying on surveys driven by the calendar and not the customer, a different approach is needed.

Firstly, much of the data collection has to be event driven – referencing the specific interaction between customer and company. Highly focused event driven 'micro-surveys' – five to eight questions issued to customers who have recent, first hand experience of an interaction raises both response rates and the reliability of the data collected. Careful design of these micro-surveys (and the capability of underpinning systems) allow data from different surveys to be aggregated, building up a comprehensive picture of overall performance.

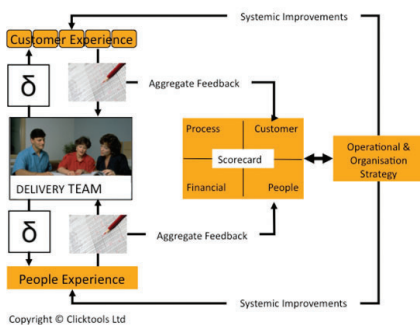
A new approach to collecting the data has to be matched with changes to the use of the data.

The primary audience for customer data is the people responsible for the work. Customer information is an essential requirement of work based continuous improvement. Today, technology allows organisations to put role specific customer feedback data on every desktop. Work

teams can analyse the customer's view of their performance and drive continuous improvement. Low scores from an individual customer that implies real dissatisfaction can be flagged for immediate follow up, providing the opportunity to nip a potential customer defection in the bud. Such responsiveness often has a significant impact on repurchase intention.

Managers can look at performance across the organisation, recognising good performance and focusing attention and investment on correcting weak areas. They can review customer data alongside financial and other operating data, looking for the connections that provide insights into the systemic issues of performance.

Someone has to take responsibility for designing a feedback system that links to the company's overall measurement framework, as described in the diagram below.



So where to start? Here are our ten steps for putting your feedback system in shape:

1. Map out your customer journey and for each key interaction ask "What matters to the customer?"
2. Use these answers to develop a suite of event driven surveys.
3. Identify like themes across these surveys (e.g. staff attitudes, responsiveness, overall satisfaction, repurchase and recommendation intention) and use common questions to enable performance across the customer journey to be tracked.
4. Identify the business process owners for questions in the surveys and use this as the basis for role relevant reporting.
5. Create automated alerts to notify process owners and account managers of any customers that report low satisfaction, thus ensuring a quick response to issues and maximise the opportunity for service recovery.
6. Build reporting mechanisms that deliver actionable data to drive change. Remember it is the actions

driven from feedback that improve the customer experience, not the feedback itself.

7. Integrate feedback and CRM to automate the deployment of event driven surveys, personalise content.
8. Pass key feedback results back into CRM to maintain a single view of the customer.
9. Use league tables to highlight best practice and set up a learning culture.
10. Integrate feedback (attitudinal) data with transactional and financial (behavioural) data to identify the actions that really make a difference.

Our advice is simple. Stop measuring satisfaction; focus on performance across the customer journey. Kill off the 'annual do you love us survey' and its monthly offspring; collect specific event data when the event happens and combine that into an overall picture of the customer experience. Recognise that managers are the secondary audience: the real audience is the people who do the work because this is where performance is delivered. These steps will go a long way to giving customers what they want – performance, not merely satisfaction.

*So, does your approach to customer measurement measure up?*